BRITISH TRADE IN CERTAIN COLONIES.

REPORTS

ON

BRITISH TRADE

IN

BRITISH WEST AFRICA, STRAITS SETTLEMENTS, BRITISH GUIANA, AND BERMUDA,

FURNISHED TO THE BOARD OF TRADE BY THE HONORARY CORRESPONDENTS OF THEIR COMMERCIAL INTELLIGENCE BRANCH IN THOSE COLONIES.

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NOTE.

In consequence of a recommendation made last year by the Advisory Committee on Commercial Intelligence, the Board of Trade requested the Honorary Correspondents of the Commercial Intelligence Branch in the British Colonies not possessing Responsible Government, and in the British Protectorates, to furnish, for the use of the Commercial Intelligence Branch, special Reports on the position of British Trade, and the nature and extent of Foreign Competition, in the respective Colonies and Protectorates.

The information contained in the Reports received in answer to this request has been utilised by the Commercial Intelligence Branch in furnishing information from time to time to British traders and manufacturers. As, however, several of the Reports appear to add materially to the trade information already available in the Annual Colonial Reports, it has been thought desirable, on the advice of the Commercial Intelligence Committee, to publish a selection of them for general information.

Board of Trade,
Commercial Department,
April, 1913.

SOUTHERN NIGERIA.

COMMERCIAL INTELLIGENCE OFFICE,
LAGOS, SOUTHERN NIGERIA.
24th August, 1912.

SIR,

WITH reference to your letter of the 6th June asking for a report as to the present position of British trade in Southern Nigeria, I have now pleasure in forwarding herewith a certified return (Appendix A) showing the classes of goods which are imported into this Colony and Protectorate in larger quantities from Foreign Countries than from the United Kingdom and British possessions. In doing so, I would point out that whilst the Southern Nigerian Customs statistics are now, and have been for the last two years, prepared in accordance with the Board of Trade's wishes, it will be seen at a glance that the "country from which the consignments originated," as now declared by the merchants, does not by any means indicate the country of production. Thus, for example, we find beads to the value of £6,000 appearing under the head of the United Kingdom in the 1911 returns, and £28,000 from Germany. The true source of origin of the greater portion of the goods was probably Austria or Italy, although the actual consignment to Southern Nigeria took place in Liverpool or Hamburg. Similarly, in the case of fish, kerosene, matches and unmanufactured tobacco, the real country of origin of a large proportion of the imports is not disclosed by the statistics, which was probably Norway, United States, Norway or Sweden, and United States, respectively. Whilst the loss or gain of the country's business in these transit goods does not affect our British manufacturers, the fluctuations are, of course, of consequence to British merchants and British shipping, a point which I shall hope to refer to later.

2. *Import Trade Conditions.*—In your letter of 6th June, I was requested to report as to the reason for the success of foreign competition, and if possible, to offer suggestions as to means whereby the trade now passing to foreign countries might be diverted to the United Kingdom or British Dominions. With regard to this phase of the question, I would call attention to the fact that the circumstances affecting the import business of Southern Nigeria are somewhat peculiar, inasmuch as, with one or two minor exceptions, the European firms trading in this part of the world are simply branches of houses which have their head offices in Europe, at which it may be said for all practical purposes the whole of the buying is done. That is to say, the local managers of the firms send their indents to their own principals in Europe, by whom the orders are placed with manufacturers, or with agents for transit merchandise, such as unmanufactured tobacco, rice, fish, beads, matches, flour, &c., not produced in the country from which these goods and others are shipped to Nigeria. I mention this point in order that it may be clearly understood that the principals of the West African firms in England are in the best position to tender really reliable information as to the causes which induce them to buy goods of foreign manufacture in preference to British, or to ship transit goods from Hamburg or Rotterdam instead of viâ Liverpool. In the majority of cases the local representatives of such firms are not completely informed as to why an appreciable proportion of their inward consignments is shipped from the Continent, and it is only by approaching their principals, who do the actual buying in Europe, that final conclusions on this large question can be arrived at.

3. With the reservation noted in the foregoing paragraph, I now proceed to report, as far as I am able, on the purely local aspects of the situation :—

Trade Organisation.—In Southern Nigeria, which has a total native population of 7¾ millions, and 10 ports served by ocean steamers (omitting minor river stations), there are about 40 distinct European firms engaged in business. Of these firms, five may be described as important German houses, two minor German firms, one important French firm, two minor Bohemian houses (who were attracted here mainly by the bead trade), and the remaining 30 British, of which about half might fairly be described as important houses. It will thus be seen that so far as the numbers of *separate* European trading firms are concerned, one quarter of the whole are foreigners. But this gives an exaggerated idea of the facilities for distribution possessed by the foreign firms as compared with the British, as it is the exception to find the German houses established in more than one or two ports in Southern Nigeria, whilst some of the British firms are doing business in several ports. Therefore, a truer conception of the relative importance of local foreign competition is obtained by comparing the total number of trading factories owned by British and foreign

merchants respectively in Southern Nigeria, and by taking into account the financial standing of the firms. Allowing for these factors, I should say, as a personal view, that the relative importance of British and foreign merchants trading in Southern Nigeria might be stated as approximately 85 per cent. British, and 15 per cent. foreign.

4. Where there is an appreciable number of foreign merchants on the spot, as in Southern Nigeria, it is only reasonable to expect that the principals of such firms will make every effort to push the sale of goods which are either produced in their own country or can be economically shipped therefrom. At a first glance, and in view of the fact that many large classes of goods sold here are not produced in the United Kingdom, it would not appear that the total value of imports received from foreign countries was disproportionate to the local representation of such countries. I fear, however, that I shall have to show that the true position is not quite so satisfactory as might be superficially supposed, more especially as it is apparent from an inspection of a Continental cargo boat's manifests that the increased shipments from Hamburg and Rotterdam are by no means entirely due to the presence of so many foreign merchants in Southern Nigeria, but that they are materially aided by shipments of goods consigned from foreign ports to British houses here. I mean goods which one might not unreasonably expect to be manufactured in the United Kingdom, or transit merchandise which could be shipped therefrom. In this connection I would invite reference to a speech made by the Chairman of the African Trade Section of the Liverpool Chamber of Commerce on 17th June, 1912, when, in the course of some remarks on the Merchandise Marks Act, he said: "There was a certain class of articles which they had to get from abroad for reasons which were not very easily explained. The net result to them as African merchants was that the Germans could supply these articles at a lower rate than they were obtainable in this country (United Kingdom), and therefore they had to go to Germany for them."

5. It may not be out of place, at this stage, to refer to the existing facilities for shipping Continental goods to Nigeria. The British line managed by Elder, Dempster and Company send two cargo steamers a month from Hamburg to Lagos, and both these boats call at Rotterdam for cargo. The Woermann Linie runs three cargo boats a month from Hamburg to Lagos, and two of these call at Rotterdam. Hence there are five steamers monthly taking Lagos cargo from Hamburg and four from Rotterdam. From Liverpool there is a weekly service to Lagos. It will thus be seen that the facilities for shipping goods from the Continent to Lagos are now equal to those afforded from Liverpool.

6. In addition to the German, French, and Bohemian merchants established in Southern Nigeria, there is also a number of Syrian and Italian traders (about 60 adult males), mostly shopkeepers and hawkers, but including one or two men who might not unreasonably be classed as merchants. Individually these people do a relatively small business, but in the aggregate their operations must amount to a fairly appreciable sum. Although a portion of their supplies is shipped from the United Kingdom, the classes of goods in which they trade are more particularly of Continental manufacture—beads, scents, cheap cutlery, jewellery, headwear, haberdashery, &c. The Syrians and Italians live very economically, and, owing doubtless to their small expenses, they appear to be able to do a business, satisfactory to themselves, in small cheap miscellaneous goods, which many of the large European merchants apparently find unprofitable, or which they consider unsafe lines to stock. I should like to make a point here of the fact that whilst in Lagos town several of the British merchants do now cater to a considerable extent for the demand for small miscellaneous articles, the assortment stocked by them in other parts of Nigeria is, generally speaking, very limited, possibly due to the small apparent demand at present. Twenty years ago there was, even in Lagos, prejudice on the part of the large European merchants against stocking cheap cutlery, small lines in hardware, haberdashery, &c., and at that time there was only one firm of consequence which made a speciality of this class of business. To-day there are, however, several important British firms in Lagos who are doing quite a satisfactory trade in such articles, in addition, of course, to their general business in staple lines. The small Syrian and Italian traders are, in my opinion, useful in introducing miscellaneous goods into markets where they would not otherwise be found, thus giving the natives an added incentive to work palm oil or kernels or other produce to acquire them. But our own merchants should not ignore the Syrian competition, which may become formidable as time goes on, in the same way that, as I am informed, many of the Indian traders in East Africa have now become merchants doing business on a large scale. I personally do not think there is much danger to be feared from the Italians.

7. No really important foreign houses have entered the Southern Nigerian trade during the last five years, and therefore it may be convenient, with a view to ascertaining the current trend of business, to state the value of British imports in 1907 as compared with 1911. In the former year the total value of imports from all sources (*exclusive of*

specie) was, according to the Customs statistics, £3,839,000, the proportion shipped from the United Kingdom being £2,892,000 or, say, equal to 75·3 per cent. of the whole. In 1911 with the total imports running to £5,227,000, the proportion shipped from the United Kingdom was £3,679,000 or 70·3 per cent. (*see* paragraph 9).

8. It should here be explained that all goods in transit to Northern Nigeria are cleared at the Southern Nigerian Customs on the seaboard; consequently the statistics quoted above include goods passing to the Northern Protectorate. These transit goods (including rail materials) were valued at about half a million sterling in 1911, or say equal to one-tenth of the whole of the imports entering Nigeria. As you are aware, the development of trade in Northern Nigeria has hitherto been checked owing to want of cheap land transport to serve the districts well away from the Niger river. But now, with the railway running to Kano, the probability of trade developments in the north should be taken seriously into account by our British manufacturers and merchants. I may state, by the way, that the population of *Northern* Nigeria was estimated last year at 7,800,000.

9. It would appear from the figures given in paragraph 7 above, that there was a difference of 5 per cent. between the share of total imports obtained by the Mother Country in 1907 as compared with 1911, but owing to more careful Customs classification of transit tobacco, &c., during the last two years, the real difference against the United Kingdom may more fairly be stated as about 3 per cent. Whilst an apparently satisfactory increase of £787,000 in the United Kingdom's exports to Nigeria has been made (1911 as compared with 1907), this increase ought, in proportion to the relative trade done five years ago, to have been about £150,000 more still.

10. As I am invited to offer suggestions generally, I would here incidently remark that our British manufacturers and merchants will be well advised in not being satisfied with an increase on their individual turnover, so far as any particular colony or foreign country is concerned, *unless such increase is proportionate to the advance in the total imports by that colony or country of goods in which they are interested.* This may possibly strike you as a very elementary and obvious suggestion, but I can assure you from my personal knowledge that many of the merchants judge their progress solely by a comparison with their own sales in former years. I need scarcely say this is often a very misleading basis to work upon, especially with regard to markets such as Nigeria, in which the total volume of trade is rapidly expanding. Superficially it might appear to these firms that they were doing very well, when as a matter of fact they were actually losing ground in comparison with their old proportion of the total business of the markets to which they were shipping.

11. *Foreign Competition.*—A close examination of the whole of the Customs statistics discloses the fact that Germany and Holland have gained more than their proportionate share of the increased business which has been passing in Nigeria. With a view to ascertaining the lines of trade in which these foreign competitors are making greater progress than our own people, I enclose herewith a statement (Appendix B) showing the classes of goods in which our competitors appear to have been more particularly active. In preparing this summary, I have omitted classes of imports in which our present position is satisfactory, and also the large lines such as trade spirits, unmanufactured tobacco and kerosene, and other goods in which the United Kingdom is not in a position to compete. I have also been obliged to omit two or three lines owing to alterations in the Customs classification which render comparisons with former years misleading. I will, however, refer later in the report to some of the classes which do not appear in Appendix B, but which I think merit attention.

12. Appendix B referred to in the previous paragraph, covers a dozen classes of goods, and shows:—

(*a*)	Total imports of each class	For each of the last five years, viz., 1907 to 1911 inclusive.
(*b*)	Imports from United Kingdom	
(*c*)	Do. Germany	
(*d*)	Do. Holland	

For ready reference I may state that the total imports of these particular classes *in 1907* were valued at £1,429,000, the shares obtained by the United Kingdom, Germany and Holland being as under:—

1907.	£
United Kingdom	1,318,000
Germany	71,000
Holland	33,000

SOUTHERN NIGERIA—*cont.*

By 1911 the total value of imports of the same lines from all sources had increased to £1,867,000, the shares obtained by the respective countries being—

	1911. £
United Kingdom	1,545,000
Germany	230,000
Holland	72,000

It will thus be seen that although Germany and Holland together in 1911 obtained only one-sixth of the total business in the classes specified, as compared with five-sixths taken by United Kingdom, they have nevertheless very appreciably improved their position since 1907, when their combined imports of the 12 classes was equal to only one-fourteenth of the total.

The percentages of increase between the two periods are as follows :—

United Kingdom	17 per cent.
Germany	224 „
Holland	118 „

13. The progress made by Continental competitors in the classes shown in Appendix B, may be broadly divided between (*a*) transit goods, and (*b*) articles manufactured in or near the country from which they are consigned to Nigeria. With regard to transit goods, which in the list immediately under notice comprises fish, flour and rice, it will be seen that the total value of shipments of these classes from the United Kingdom in 1907 was £67,000 as compared with £114,000 in 1911, this increase being equal to 70 per cent. Germany, however, shipped only £12,000 in 1907 as against £86,000 in 1911, the advance in this case being equal to 600 per cent. Holland is for all practical purposes not at present interested in the transit goods in question, her shipments amounting to only £1,600 in 1911.

14. With reference more particularly to the transit goods referred to in the preceding paragraph, it is said that the dock dues and shipping charges generally are more favourable to the merchants at Hamburg than at Liverpool. I have unfortunately no means of comparing these charges, but I would venture to suggest that the question is a vital one well worthy of the serious consideration of the authorities at home, not only as regards goods shipped outwards, but also in respect of inward consignments. With regard to the latter, viz., the comparative charges on transit merchandise such as I have mentioned *entering* Hamburg or Liverpool, respectively, for re-shipment, it will be recognized that this is a factor which needs to be taken into serious consideration, as well as that of the respective dues on consignments leaving the ports named. The question of freights from Norway, United States and India to Hamburg or Liverpool, respectively, also naturally enters into the calculation, so far as fish, flour and rice are concerned.

15. To go into the question of the comparative freights and shipping dues on raw materials arriving at United Kingdom or Continental ports would carry me far beyond the scope of the enquiry you desire, although those charges might have a material bearing upon the selling price of the manufactured article, but there is one point concerning this phase of the question to which I think I might pertinently direct your attention. It is with reference to the dock dues, &c., charged on the principal staple product of Southern Nigeria, viz., palm kernels, which I was a few years ago given to understand were lighter in Hamburg than Liverpool. I quote below the kernel export figures for your information, should it be considered desirable to investigate this problem. They are as follows :—

	Total Value of Palm Kernel Export from Southern Nigeria	Shipped to United Kingdom	Shipped to Germany	Shipped to other Countries
	£	£	£	£
1907	1,658,000	286,000	1,334,000	38,000
1908	1,425,000	231,000	1,093,000	101,000
1909	1,816,000	179,000	1,500,000	137,000
1910	2,450,000	300,000	2,072,000	78,000
1911	2,574,000	319,000	2,166,000	89,000

The total tonnage of palm kernels shipped from Southern Nigeria last year (1911) was 176,390.

My own impression of the matter is that the kernels go to Germany in preference to the United Kingdom because there are at present only a few crushing mills near Liverpool, and, consequently, a very limited market, as compared with Hamburg. It is also probable that the manufactured products, refined oil, butter substitutes, and cattle cake can be more economically distributed to the large consuming countries from Hamburg than from Liverpool. How far the Continental mills are fostered by more favourable shipping dues I am unable to say, but the figures I have quoted above would seem to indicate that some early enquiry on the subject was needed.

If there are insuperable reasons against the United Kingdom being able to materially enlarge her share of our palm kernel export business, could not something be done in Canada? One would think there would be a field there for the distribution of the commodities manufactured from these kernels, although I suppose cotton-seed products from the States would compete with some of the manufactured articles. I may state, by the way, that three cargoes of palm kernels have been shipped from Nigeria within the last 18 months to Durban, where they were consigned to the branch of a United Kingdom firm. This is a step in the right direction, and if mills could also be started in Canada to deal with the produce, we might in the near future find that our own people were benefiting far more than at present by the Nigerian kernel trade.

Athough the destination of our kernel exports may seem foreign to a report on the United Kingdom share of the Southern Nigerian *import* business, it really has a marked indirect bearing upon it, for without the large return trade in palm kernels the steamship companies would never offer such facilities for shipping goods from Hamburg and Rotterdam as I have referred to in paragraph 5, although the Continental spirit trade would necessitate a limited service. What is perhaps more important is the fact that our principal German competitors came out here primarily for palm kernels, for which they had a better market in Hamburg than our own merchants possessed in Liverpool. When once established in Southern Nigeria the German firms very naturally took up the sale of trade spirits, tobacco, &c., *and also general manufactured goods in competition with the British merchants.* The point of my apparent digression is that if it had not been for the more favourable market for palm kernels on the Continent, the foreign competition here to-day in the sale of goods would not be nearly so pronounced as it is, nor would the Continental shipping facilities be on a parity with those to and from the United Kingdom.

It is to be hoped, in view of the probable development of a large export trade in shea-nuts from Northern Nigeria within the next few years, that mills may be available in the United Kingdom to deal with the produce, so that further special inducements are not afforded to tempt foreign competitors to embark in business in Nigeria.

16. Commenting upon the manufactured goods which appear in the list of selected articles (Appendix B) and which comprise cotton, woollen and silk manufactures, guns, gunpowder, coopers' stores, earthenware, furniture and smoking pipes, a few general observations may not be out of place. The total value of imports from the United Kingdom in the nine manufactured classes referred to above was in 1907 £1,250,000 as compared with £1,431,000 in 1911, this increase being equal to 14½ per cent. In the same years the imports from the Continent (viz., Germany and Holland together) were as follows :—

1907.	Imports from Germany and Holland ...	...	£92,000
1911.	Do. do. ...	...	£214,000

equal together to an increase of 132 per cent. In total *value* the imports from the Continent, even of these selected classes, may not appear very formidable, being equal in 1911 to only one-seventh the total value received from the United Kingdom, but if Continental shipments go on increasing during the next ten years as they have during the last five, we shall in 1922 find that Germany and Holland together are securing almost as much of the trade of Nigeria as the United Kingdom in the classes quoted.

17. The most striking illustration of Continental activity in manufactured goods is to be found in a class where one would least expect it, viz., textiles. Here, taking cotton, woollen and silk goods together, we find that the trade of Germany and Holland with Nigeria has risen from £50,000 in 1907 to £135,000 in 1911. An appreciable proportion of this increase may be attributed to cheap velvets, plushes and velveteens, and to Dutch and German prints. In plain white or grey cloths, and also in woven coloured goods and the majority of prints, the Lancashire manufacturers are holding their own, and I would attribute the success of Continental makers in velvets, &c. to cleverness in dyeing and finishing, and, as in the case of prints, to skilful blending of

colours and originality of design, rather than to any weakness on our part in the manufacture of the unfinished cloth. In the course of my enquiry I was, by the way, gratified to learn that some of our largest firms in Lancashire and Yorkshire are giving serious attention to the above points, and that they hope to regain their position in the trade of Nigeria, which, in certain branches of the textile business, is at present seriously threatened.

18. In Appendix C, I submit a memorandum dealing with certain articles which are not included in "B," but in which I think our British manufacturers should be able to secure a larger share of the business than they are doing at present. In view of the aggressiveness of foreign competitors in classes of goods which were originally shipped from Great Britain, prudence would appear to demand that our own people should do more than simply protect the trade they have already secured, and that they should retaliate by attacking the foreign suppliers in some lines which have for one reason or another been hitherto regarded as Continental specialities. In particular, I would direct attention to the notes in Appendix "C" under the headings of enamel ware, implements and spirits.

19. The success of foreign competitors in Nigeria during recent years, so far as manufactured goods are concerned, would appear to be mainly due to lower prices combined with cheaper qualities put on the market in an attractive form, and in a lesser, but distinctly appreciable degree, to certain articles being of good quality and more popular design than the styles imported from the United Kingdom.

I am not in a position to speak as to Government bounties in the country of production, and none of the merchants here know of any which affect their trade.

Foreign commercial travellers are practically unknown here, and any increase of business cannot be attributed to their representations.

20. To sum up my views with regard to this large question as it affects manufactured goods, I would say from all I have been able to gather from the local merchants, combined with my personal knowledge of the trade, that the progress made by foreign manufacturers is largely due to the fact that they are in some classes of goods, but certainly not in others, more enterprising than our own makers, and that they often display more initiative and resource. Whilst the "enterprise" of foreign suppliers very frequently takes the questionable form of reducing qualities, it would be unfair to suggest that this method of competition accounts for the whole of their success, or indeed that the reduction of qualities was peculiar to foreign makers. Some of the increased business done by the Continent with Nigeria is clearly well merited by suitable patterns and good qualities, and it would be taking altogether too narrow a view to look upon this as otherwise than perfectly legitimate and healthy competition.

British makers have, in several classes of merchandise, shown that they also can reduce the grade of goods very materially, and especially in cotton piece goods are our own people adepts at bringing out lower qualities to compete with a better cloth established by a rival *British* firm. In this particular respect, therefore, I fear we are not in a position to make much capital out of the reduction of qualities practised by German and other foreign competitors. Our own manufacturers of *all* classes of goods need, however, to grasp the fact that the general conditions under which business is done in the tropics are very different from those applying to European countries, where the bulk of the consumer's purchases are made from responsible dealers. Here in Nigeria practically the whole of the goods for native use are *not* sold by the European merchant to the actual consumer, but to native middlemen who are always on the look out for cheaper qualities which they can pass off in the open markets in competition with goods of better quality, and, of course, higher price. It is not a pleasant feature of the trade, but, as it exists and will continue, British manufacturers might as well cater for the demand for low grade goods, which will certainly be met by foreign competitors if our own people decline the business. But there should be no loose application of trade marks, and the brand which has been used on standard qualities should not on any account be applied to cheap substitutes. Whilst there is undoubtedly a large demand for low priced articles in Nigeria, there is also, I am glad to say, a steady business done in standard qualities of certain classes of goods, which the natives continue to buy in preference to cheaper ones because they know from experience that the trade mark indicates good quality. The discriminate use of trade marks is of the very first importance to our merchants, and is a question which they will do well to take seriously to heart.

Continental suppliers of certain classes of goods are said to be far more willing than the British to put themselves out of the way to execute small trial orders of new patterns or cheaper qualities, or to alter the packing to suit a particular market. They have

evidently learnt from experience that useful repeat orders often follow, and that new staple lines are established as a reward for their more painstaking efforts. They are especially strong, in comparison with the average British maker, in putting up their smallwares in an attractive manner which appeals to the native buyer. The Continental makers have looked upon the buyers' wishes as of the nature of a command, realising that in the long run it pays them to do so. It would also appear as if the Continental suppliers took a much wider view of the possibilities of trade expansion in these markets, especially in the way of cheap but attractive looking goods, and that they were more ready to supply small trial shipments of new styles to test the market.

21. In conclusion, I would remark that whilst the position of the United Kingdom's trade with Nigeria may, on the whole, be considered fairly satisfactory, British suppliers are undoubtedly losing ground in certain classes of goods. Although such loss has been more or less obscured in the general expansion of trade, it is evident that if shipments from the Continent continue to increase as they have done during the last few years, they will, in the course of the next decade become very formidable indeed, and the United Kingdom will not secure anything like the share of the total trade to which she is entitled.

I have, etc.,
C. A. BIRTWISTLE,
Commercial Intelligence Officer
in Southern Nigeria.

The Assistant Secretary
(Commercial Department),
Board of Trade.

APPENDIX A.

STATEMENT showing the quantity and value of goods which are imported into Southern Nigeria the years

Class of Goods	Total Imports from all Sources.						Imports from United			
	1909.		1910.		1911.		1909.		1910.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£		£		£		£		£
*c*Ale, Beer, Porter, &c. :—										
Dozen Quarts	23,041	4,769	28,151	5,869	32,268	6,744	6,275	1,375	8,165	1,789
Imp. Galls. (in wood)	543	69	464	57	—	—	18	2	18	2
*Beads ... ... lbs.	—	35,712	618,648	37,701	925,983	48,090	—	5,126	121,611	7,246
‡Cheese ... ... „	Other wise classified.		40,734	1,407	41,678	1,651	—	—	15,735	652
*Cigars ... ... Number	1,564,230	4,192	1,680,629	4,249	1,632,128	4,336	111,725	334	390,055	722
*c*Enamel Ware ... ... Pkgs.	5,182	13,845	9,337	29,413	11,140	32,661	1,135	3,215	2,854	9,823
*b*Fish ... ... Cwts.	—	18,366	24,205	34,952	46,295	68,131	—	4,238	3,782	3,859
*b*Guns, Dane... ... ... Number	2,779	876	11,137	3,792	18,667	6,450	1,493	440	2,845	1,006
*Kerosene** ... ... Imp. Galls.	1,663,684	59,277	2,791,829	86,447	3,181,324	73,861	22,342	887	121,565	3,913
*c*Matches ... ... Gross Boxes	403,488	15,510	324,545	14,906	272,097	13,460	163,980	6,400	57,577	2,725
*b*Pipes, Smoking ... ... Number	552,224	4,650	8,344,066	8,253	10,295,158	9,542	247,708	3,306	5,089,533	4,962
Spirits :—										
Gin ... ... Imp. Galls.	2,573,953	252,752	4,093,085	395,936	4,242,558	385,201	28,163	7,679	30,277	8,231
Rum ... ... „	438,030	27,539	584,602	31,744	515,412	24,934	104,950	7,097	109,773	7,032
§Starch and Blue ... ... Pkgs.	Other wise classified.		4,344	2,408	2,644	1,879	—	—	964	836
*Tobacco, Unmanufactured** lbs.	6,042,225	187,855	5,956,604	182,938	3,048,846	154,173	5,502,207	171,734	617,904	19,138
*Wines :—										
Claret ... ... Imp. Galls.	15,997	2,334	11,752	1,792	15,133	2,987	6,419	1,326	3,513	803

* United Kingdom not in a position to compete in classes marked with an asterisk.

c Explanatory notes *re* beer, enamel ware, matches, and spirits will be found in memorandum in Appendix "C."

§ No reliable information obtained as to why United Kingdom does only one-third of the starch and blue business, but a very small line.

APPENDIX A—*cont.*

in appreciably larger quantities from Foreign Countries than from the United Kingdom during 1909, 1910, and 1911.

Kingdom.		Imports from Germany.						Imports from Holland.					
1911.		1909.		1910.		1911.		1909.		1910.		1911.	
Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
	£		£		£		£		£		£		£
7,953	1,774	15,666	3,156	18,599	3,794	21,394	4,398	1,100	238	1,295	265	2,798	549
—	—	478	60	398	53	—	—	24	3	—	—	—	—
166,757	6,272	—	28,702	405,358	26,083	446,526	28,854	—	1,107	276	52	2,681	156
11,197	469	—	—	7,304	112	3,605	158	—	—	17,224	618	25,891	993
163,755	433	479,501	1,721	340,802	1,235	448,789	1,429	956,454	2,090	940,672	2,258	1,012,626	2,444
3,800	11,058	3,610	9,376	5,611	16,954	6,639	19,310	428	1,249	819	2,487	694	2,290
8,736	8,176	—	13,217	16,467	25,932	35,723	57,695	100	68	100	166	279	453
7,011	2,486	200	75	506	186	1,720	619	1,080	357	5,631	1,893	9,373	3,161
139,573	4,000	739,608	26,656	1,151,030	36,829	406,823	32,154	1,042	28	10,160	368	—	—
78,917	3,764	186,278	7,843	211,157	10,374	160,679	8,241	52,750	1,246	39,190	1,013	24,448	1,055
3,383,029	3,350	126,320	416	2,535,286	2,178	4,980,892	4,476	178,008	920	566,288	387	1,881,585	1,322
35,123	8,657	529,018	58,217	831,394	85,113	809,689	79,347	2,016,757	186,837	3,231,382	302,585	3,397,740	297,196
47,841	3,068	258,738	15,287	328,051	16,161	309,939	14,491	71,408	4,967	139,965	7,977	155,334	7,222
539	605	—	—	1,046	889	406	461	—	—	1,216	157	30	19
819,883	25,812	539,812	16,115	288,019	8,316	210,023	5,540	—	—	40	2	—	—
4,537	1,409	2,593	460	1,374	220	4,479	787	63	23	4,088	461	97	14

b Explanatory notes *re* fish, Dane guns, and smoking pipes will be found in memorandum in Appendix "B."
† Small imports from United Kingdom due to preference for Dutch cheese, which is wholesome and cheap.
** In these cases there are large importations from the United Kingdom.

APPENDIX B.

MEMORANDUM concerning classes of goods shown in the appended Table which gives the separate imports for each of the last five years of the following lines from United Kingdom, Germany, and Holland, respectively :—Fish, flour, rice, Dane guns, gunpowder, coopers' stores, earthenware, furniture, cotton, woollen and silk manufactures, and smoking pipes.

	Total Imports of the 12 Classes.	Imports from United Kingdom.	Imports from Germany.	Imports from Holland.
	£	£	£	£
1907	1,429,000	1,318,000 = 92·2 per cent.	71,000 = 5·0 per cent.	33,000 = 2·3 per cent.
1908	1,342,000	1,216,000 = 90·6 „	75,000 = 5·6 „	40,000 = 3·0 „
1909	1,465,000	1,255,000 = 85·7 „	143,000 = 9·8 „	61,000 = 4·2 „
1910	1,856,000	1,589,000 = 85·6 „	172,000 = 9·3 „	74,000 = 4·0 „
1911	1,867,000	1,545,000 = 82·7 „	230,000 = 12·3 „	72,000 = 3·9 „

Fish.—The trade in dried fish has expanded to a remarkable degree during the last few years, viz., from £8,000 in 1907 to £68,000 in 1911, and in the latter year Germany obtained 85 per cent. of the whole business. Bulk of imports said to be dried stock fish, and the source of origin Norway, although a small quantity comes through from the Canary Islands. Possibly the geographical position of the German port permits of lower freights from main source of supply, but it also suggested that the shipping dues, &c., are less favourable to the merchants at Liverpool than at Hamburg. Query :—Can the British merchants land Norwegian produce in Liverpool as cheaply as the same stuff can be delivered in Hamburg, and, if not, is it the freight from source of supply which is driving the trade to Hamburg, or our port dues? Also cannot our own merchants do something with fish from Canada to compete with the Norwegian? The dried fish industry is a very important one in Nova Scotia, and one would think something might be arranged for mutual benefit of United Kingdom and Canada. If freights to Nigeria *viâ* Liverpool are prohibitive, probably the fish could be shipped cheaply from Halifax to New York, and thence to Nigeria by the special joint Elder Dempster and Woermann service which has sailings once a month from New York to West Africa. The fish, by the way, is shipped in canvas (? "hessian") trusses or bales.

I understand that a small trawling company has recently been formed to exploit the waters off the West African coast, with a view to establishing a cured fish industry on the spot. In the event of this venture proving successful—and it is undoubtedly a sound proposition if only suitable trawling grounds can be found—imports from northern countries will, of course, be checked, but in my opinion it will be many years before appreciable supplies of local factory dried fish will be available for sale in Nigeria.

Flour.—Imports from Germany have risen from £200 in 1907 to almost £8,000 in 1911. Although a small quantity of Hungarian flour may come through *viâ* Hamburg, I am advised that the bulk of that shipped from the German port is really of Canadian origin, the flour being forwarded *viâ* New York to Hamburg and thence to Nigeria. It is singular, but a fact, that the largest turnover in flour in Lagos, the principal centre of business in Nigeria, is handled by a Hamburg firm, and one wonders why a commodity such as this, and which I have the best of reason for believing is the product of Canada, should be traded in to almost as large an extent by a German firm as by the combined British houses in Lagos, several of which have their headquarters in Liverpool. I can scarcely imagine that freights Canada or New York to Hamburg are any lower than to Liverpool, and certainly there is no difference between the tariff Hamburg to Nigeria, and Liverpool-Nigeria. British millers have made several attempts to obtain a fair share of the trade, but with only a small measure of success. I am informed that the Canadian flour is moderate in price and that it keeps in good condition for a reasonable period in this climate, which is a very important point.

Rice.—A very marked advance by Germany in her share of the whole trade is to be noted here. The imports of rice from Germany in 1907 were valued at £7,800, and they remained at or below that figure until 1910, when the receipts from Hamburg rose to £11,300 to be followed in 1911 by £21,000. One reason suggested to account for this large increase, is that on some occasions last year the British merchants trading in the Eastern province of Southern Nigeria found it more convenient to ship rice from Hamburg to certain ports than from Liverpool, a saving in time being thereby effected. Another reason is that the German firms trading in Nigeria have during the last few years found competition in the produce business keener, and in consequence they are laying themselves out more for the trade in staple imports such as rice.

Dane Guns.—These are very cheap flint locks. A relatively very small line of trade, the total value of all imports in 1911 being only £6,400, of which one-half was shipped from Holland. The real source of origin of the foreign guns is, I believe, Belgium, from which country they are sent to Rotterdam and shipped therefrom. As I suggest, it is a small line, but I include it because whilst shipments from the United Kingdom in 1907 and 1908 were double the values of those from Holland, the latter country now sends us about one-third more than we receive from the United Kingdom. The only information I can obtain here as to the apparent growing preference for the guns shipped from Rotterdam is that a cheaper article can be obtained on the Continent than in the United Kingdom. This is corroborated by the declared value of cost at the Customs, the 1911 imports from the United Kingdom averaging 7*s.* 1*d.* per gun as compared with 6*s.* 9*d.* from Holland.

Southern Nigeria—*cont.*

"*Trade*" *Gunpowder.*—Owing to higher Customs duties, which have checked the trade, the total imports from all sources were almost £3,000 less in 1911 than in 1907. On the returns for the two years, the whole of this loss has been borne by the United Kingdom, Germany still shipping as much as she did five years ago. Rather singularly, whilst almost the entire imports of powder into the Western (Lagos) Province come from Germany, only a very small quantity finds its way from Hamburg to the Central and Eastern Provinces. I can only attribute the popularity of German powder in Lagos and its hinterland to the fact that the two large German houses engaged in business here made a speciality of powder many years ago at the time they ran their own ships, and that the natives then became accustomed to the coarse grained quality, which resembles blasting powder.

At the same time I think enterprise and perseverance on the part of our British merchants might go far towards supplanting the German powder, which is chiefly imported here in small kegs containing only 2 lbs. and 4 lbs. each in bulk. Possibly 10 lb. kegs containing 10 1-lb. or 20 ½-lb. cotton bags (waterproofed and non-inflammable if possible) of British powder would be found as economical a form of packing as the German, in which the cost of small kegs must be an important item. French powder sold in the adjacent colony of Dahomey, and smuggled over into the Western Province of Southern Nigeria, is imported in kegs containing a number of bags, and that is a form of packing for this article which I think would appeal to the native buyers. Each bag should bear the standard trade mark of the British importing firm, and it would be an advantage if a small wax plug could be inserted in the mouth of the bag, and the neck fastened with a lead disc bearing the importing firm's mark, similar to the seals used on bags of salt, but, of course, much smaller. Some years ago I had tests made by native "hunters" with British powder, as supplied to the Central and Eastern Provinces, and they agreed that the British was the better quality, but our natives are very conservative, and it is often difficult to move them even with a better article when once they have become accustomed to a certain brand. Still, if gone about in the right way, I believe we could successfully introduce common or "trade" British powder into the Lagos markets.

Coopers' Stores.—Chiefly the staves and heads of palm oil casks sent out here in bundles, and locally known as "shooks." These shooks are received either new or second-hand, the latter having already done service, and being really returned empties which have been overhauled by coopers in Europe and put in good condition. From the statement attached to this Appendix it will be seen that Germany and Holland together shipped only a little more than a quarter the value of consignments from United Kingdom in 1907, but that they now do half as much. In addition, shooks to the value of £5,900 were received here from United States of America last year. So far as I am advised, a large proportion of the staves and heads coming out here from the Continent and United States of America are second-hand. It is not unreasonable to suppose that with the increased shipping facilities from Holland and the United States, the coopers in those countries should find a market in Nigeria or other parts of West Africa for any empty oil casks they can collect. Large quantities of palm oil are, of course, exported to the Continent and also to America, and it is not improbable that a good deal of the business in returned and repaired empties is now done direct from the countries in question instead of *viâ* Liverpool, where the patching up of second-hand casks is an important branch of the coopers' business.

Earthenware.—In 1907 the combined share of this business taken by Germany and Holland was about one-ninth of the whole, as compared with one-quarter in 1911. Reason given by local merchants is that Continental suppliers show more originality in shape, design and colouring than the general run of makers in the United Kingdom. In this particular business, my personal opinion is that the Continental designs and shapes have appealed more to the natives than the old stereotyped patterns with the crudest of colourings shipped from the United Kingdom, and that it is not a question of lower prices. About one-half the total Southern Nigeria imports of earthenware are handled at Lagos, which may be fairly described as the most progressive business centre in West Africa. Ten years ago the receipts of earthenware at that port from Germany averaged under £400 per annum, *and nothing came from Holland.* In 1910–11 the average receipts per annum at Lagos from Germany was £2,000 and from Holland £3,700. Putting it another way, Germany and Holland together secured 35 per cent. of the whole earthenware trade at Lagos in 1910–11, as compared with eight per cent. only ten years ago. It is figures such as these which bring home to one the activity of foreign competitors in classes of goods in which we formerly did nine-tenths of the trade, and in which our position was considered fairly secure.

Furniture.—In this class the increase made by Germany is about proportionate to that secured by the United Kingdom. About one-quarter of the whole of our imports are of Continental origin, and one would think we should be able to obtain a greater share. Of course suppliers on the Continent are much stronger than those in the United Kingdom in the way of bentwood chairs, &c., but that does not account for the whole of their business by any means, although it forms an appreciable share. In the course of my enquiries here, I have been told that the Continental manufacturers seem to go in more largely than the British makers for what I am informed is known in the trade as "knock-down" and collapsible furniture. This class of furniture (mostly chairs) is so constructed that it can be easily taken to pieces or folded up and packed in an economical form for shipment. The German firms also do a fairly large business in canvas deck chairs, which are much cheaper than those generally obtainable in the United Kingdom. But I think the great secret of their success lies in the freight saving goods they supply, and this is a very important factor which our own manufacturers not only in this but in other businesses, need to pay most particular attention to.

Textiles.—In 1907 the proportion of our total imports of cotton, woollen and silk manufactures secured by Germany and Holland was equal to only 4·3 per cent. of the whole, their combined business then running to £50,000 only. In 1911 their share had risen to £136,000, equal to almost 10 per cent. These are somewhat disquieting figures, concerning, as they do, the principal manufacturing industry in the United Kingdom. A large portion of the increase, as I am informed, is due to velveteens, figured velvets, silk-faced velvets, and plushes. Some of these goods are classified as cotton manufactures and the remainder as silk, although the proportion of pure silk is, generally speaking, very slight. The reasons given by the local merchants for the increasing trade with the Continent in velvets, &c., is that for the same money a more attractive looking article can be

obtained than from the United Kingdom. I concluded from what I was told, and from the samples shown to me, that the pile cutters, dyers and finishers on the Continent can turn out a cheap cloth to look equal to a really better quality of British manufacture. Richness of colour in the cheaper qualities from the Continent and "lustre" are more particularly spoken of by the local merchants as being superior to that found on the same quality of cloth produced in England. There is no suggestion that our Lancashire and Yorkshire manufacturers cannot produce the plain uncut cloth as cheaply as the Germans, and it would appear as if the success of Continental manufacturers was more particularly due to their skilful finishing processes, and I have been informed that the grey cloth for some of the velvets which are imported here from Hamburg is really manufactured in Lancashire and sent over to the Continent for dyeing, &c.

Another class of textiles in which the imports from the Continent have very appreciably increased during recent years is Dutch and German prints. These goods are of excellent quality throughout, and the successful business done by foreign competitors in such goods may be attributed to the originality of the designs and to the effective blending of fast colours, in which latter respect the Continental printers seem to excel. I am informed that until quite recently nothing to match some of the Dutch and German styles could be obtained in the United Kingdom, but that now the British printers seem to be mastering the colouring, and that there is a reasonable prospect of the United Kingdom getting back some portion of this particular trade.

With regard to woollen goods, so far as I can learn here the increase in imports from Germany is mainly due to Berlin wool, shoddy rugs, blankets and shawls, and to a very minor extent to low quality suitings.

Smoking Pipes.—We have here, in a very small class of goods, another illustration of progress made by foreign competitors at the expense of British makers. In 1907 Germany and Holland together did about one-quarter of the whole business in smoking pipes; to-day they are securing 60 per cent. The local merchants attribute the loss of the United Kingdom's trade to cheaper pipes obtained on the Continent. It is regrettable that in a trade such as this, where labour forms a very large proportion of the cost of the finished article, we should find the trade falling into other hands. If the shipments from United Kingdom had increased in proportion to the total pipe trade in Nigeria, the business in British supplies of these goods would be double what it is to-day. The bulk of the pipes imported, are, by the way, clay ones (white and torrified), and I believe the industry for the West African export trade is more particularly carried on at Glasgow and Manchester.

Appendix B—*cont.*

Comparative Imports into Nigeria of a selected number of Classes of Goods in which supplies from the Continent have increased in greater proportion during recent years than those from the United Kingdom. (Spirits, Unmanufactured Tobacco, Kerosene and other goods in which the United Kingdom is not in a position to compete are purposely omitted from this list.)

—	Total Imports from All Sources.					Imports from United Kingdom.					Imports from Germany.					Imports from Holland.				
	1907.	1908.	1909.	1910.	1911.	1907.	1908.	1909.	1910.	1911.	1907.	1908.	1909.	1910.	1911.	1907.	1908.	1909.	1910.	1911.
	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£	£
Fish	7,954	7,706	18,366	34,952	68,131	3,383	2,412	4,238	3,859	8,176	4,271	4,398	13,217	25,932	57,695	—	15	68	166	453
Flour	11,084	15,415	16,972	21,368	24,323	10,779	14,784	13,586	10,393	12,117	242	609	3,327	9,216	7,801	—	—	32	24	2
Rice	61,493	65,242	66,305	110,908	116,740	53,658	58,693	57,713	97,972	93,746	7,803	6,375	7,643	11,348	21,081	—	10	282	1,443	1,138
Total "Transit" Goods in the above classes.	80,531	88,363	101,643	167,228	209,194	67,820	75,889	75,537	112,224	114,039	12,316	11,382	24,187	46,496	86,577	—	25	382	1,633	1,593
Dane guns	9,221	5,081	*876	3,792	6,450	6,112	3,083	440	1,006	2,486	158	128	75	186	619	2,937	1,727	357	1,893	3,161
Gunpowder	18,926	20,224	*14,084	22,323	16,011	14,235	15,521	10,056	15,419	11,039	4,682	4,698	4,020	6,797	4,971	—	—	—	106	—
Coopers' stores	122,466	134,449	167,094	195,011	152,496	94,809	99,780	117,365	139,243	98,540	8,861	10,215	17,250	19,785	13,149	16,755	22,625	31,772	33,973	35,028
Earthenware	20,207	17,608	19,752	30,474	28,238	17,690	13,744	13,463	21,753	20,279	1,258	1,928	2,659	3,814	4,660	1,190	1,812	3,605	4,856	3,061
Furniture	17,383	18,351	20,085	18,785	27,610	12,482	12,087	15,305	13,305	19,210	4,593	5,702	4,345	4,576	7,251	83	53	30	304	118
Cotton manufactures ...	1,078,224	983,410	1,075,368	1,278,346	1,231,702	1,036,807	936,669	974,141	1,186,656	1,143,297	27,702	29,959	77,224	65,459	70,348	10,643	10,449	20,770	20,771	14,726
Woollen manufactures ...	27,260	26,051	29,012	34,649	38,970	20,054	20,634	20,162	23,644	25,751	6,504	4,290	7,699	9,892	11,840	573	883	1,063	560	881
Silk manufactures	48,636	42,532	32,954	97,368	147,233	43,303	35,273	25,469	70,819	107,018	5,159	6,670	5,136	13,220	26,761	11	71	2,029	9,383	12,127
Smoking pipes	6,387	6,371	4,650	8,253	9,542	4,755	4,040	3,306	4,962	3,350	348	304	416	2,178	4,476	1,271	2,024	920	387	1,322
Total Manufactured Goods in the above classes.	1,348,710	1,254,077	1,363,875	1,689,001	1,658,252	1,250,247	1,140,831	1,179,707	1,476,812	1,430,970	59,265	63,894	118,824	125,907	144,075	33,463	39,644	60,546	72,233	70,424
Total "Transit" and Manufactured Goods together in the above classes.	1,429,241	1,342,440	1,465,518	1,856,229	1,867,446	1,318,067	1,216,720	1,255,244	1,589,036	1,545,009	71,581	75,276	143,011	172,403	230,652	33,463	39,669	60,928	73,866	72 017
Percentage of Total Imports of above classes.	—	—	—	—	—	92·2	90·6	85·7	85·6	82·7	5	5·6	9·8	9·3	12·3	2·3	3	4·2	·4	3·9

* Reduced shipments of guns and powder, due to increased customs duties.

APPENDIX C.

MEMORANDUM concerning certain classes of goods not included in Appendix B, but in which the United Kingdom might secure a larger share of the total trade.

Enamelware.—Whilst a comparison with 1907 is not possible, owing to these goods being included under the general head of Hardware until 1909, the following figures show the comparative imports for 1909–11 :—

—	1909.	1910.	1911.
	£	£	£
From United Kingdom	3,215	9,823	11,058
„ Germany	9,376	16,954	19,310
„ Holland	1,249	2,487	2,290

In this particular instance, it would appear that we had gained proportionately more than the Continent since 1909, but my object in referring to the figures is to show that the total import from the United Kingdom in 1911 was only half that from Germany and Holland together, viz., United Kingdom £11,000 as against the Continent £21,500. It has also been suggested to me that a certain proportion of the enamelware shipped via Liverpool is really of continental manufacture.

The merchants here are agreed that the quality of British made enamelware is far superior to that received from the Continent, but state that the latter is much cheaper, and that there is here a demand for low priced qualities which apparently the British makers do not care to touch.

As enamelware furnishes a suitable illustration, I do not think I can do better than enlarge somewhat upon the question of supplying cheap qualities of goods to markets in which there is a demand for such stuff. In that respect our British manufacturers seem often to lag behind, being content, for at all events a time, to lose the business rather than reduce their quality. On the other hand foreign competitors, and especially the Germans, appear to be always open to supply—down to a certain point, of course—cheaper types of goods if asked to do so. Generally speaking, the attitude of British and Continental manufacturers towards cheap qualities would seem to indicate that the latter anticipated demands for low grades in tropical markets, where a large proportion of the purchasers are more impressed by appearance and cheapness than by the real worth and wearing qualities of an article.

I have already indicated that so far as good qualities are concerned, the British manufacturer can, with a few exceptions, hold his own, but he certainly does not in certain departments get his share of the cheaper lines which are going, and I think he should not despise this class of business which in rapidly expanding markets like Nigeria would mean, in the course of time, a very useful addition to his turnover. It would appear in certain classes of goods that the "lowest possible" quality was looked upon from a different standpoint in Germany than in the United Kingdom, but, strange to say, not in other classes. In cheap tinware and buckets, for example, we do practically the whole of our business with the United Kingdom, and also by far the greater trade in cheap galvanized roofing sheets. Had not the British makers of these goods reduced their qualities, it is probable that the bulk of the existing trade in them would have passed ere this to the Continent. Perhaps mention of what has happened in the galvanized sheet business will help towards a clearer understanding of my point. Twenty years ago in Lagos the regular type of roofing iron sent out here was 24 gauge, then 26 guage was introduced and cut out the 24, and subsequently 28, 30 and even a thinner gauge still was brought out, and to-day practically the whole of the business, so far as the native trade is concerned, is done in Lagos in this last named very thin quality. The result of the British makers keeping pace with the competition which rules here is that in roofing iron they have kept four-fifths of the total trade, the imports from the United Kingdom in 1911 being of the value of £84,000 as compared with total receipts from all sources of £103,000, and I have reason to believe that a quantity of roofing iron shipped to the local German firms from Hamburg was really manufactured in the United Kingdom.

Implements and Tools.—Total imports in 1911 were valued at £51,000, of which the United Kingdom secured £29,000, Germany £18,500, and Holland £3,000. The large imports from the Continent may to a great extent be accounted for by the fact that British makers cannot or will not produce a cheap "matchet" suitable for this country both as regards quality and price. These matchets, or cutlasses as they are sometimes termed, are used by farmers and others throughout Southern Nigeria, and I believe in the tropics generally, and a large trade is done in them. Some time ago, when pursuing enquiries on this particular subject, I learnt that the business was practically confined to a wealthy ring of rolling mill firms in Germany, but I have never been able to understand why the British makers could not compete, and I would suggest that the matter is one well worthy of attention. I would press the point because four-fifths of the cheap cutlery is imported from the United Kingdom, and in that branch of trade we seem to be holding our own. If we can compete in cheap tinware, roofing sheets, and cutlery, it seems odd that we should not also be able to do so in the matchet business, which is very well worth having.

A relatively small quantity of tools is also imported from Germany, but the bulk of the business secured by that country under the head of "implements and tools" is undoubtedly transacted in matchets.

Sugar.—Total 1911 imports £20,700, of which £11,500 came from the United Kingdom, £6,700 from Germany, and £2,000 from Holland. The imports from Germany are practically confined to the Western (Lagos) Province, where £6,000 worth was received last year as compared with only £2,000 from the United Kingdom. The local merchants attribute the preference for German sugar primarily to cheapness, and to some extent to forms of packing which are more convenient for distribution to small retailers.

With regard to the question of price, I find that the declared value of sugar received from the United Kingdom in 1911 (exclusive of freight) was 20*s.* per cwt., whilst that from Germany cost

15*s.* per cwt. only. It is not suggested that the sweetening qualities of 20*s.* worth of English sugar is not far more than 15*s.* worth of German, but our natives like to see a good deal in the way of bulk for their money, and it would be difficult to convince them that with a piece of British sugar say three-quarters the size of the German they would get the same amount of true sweetening matter.

Concerning packing, which is always an important factor in these markets, a dozen years or more ago cube sugar was imported from the Continent in 50 kilo. cases, say approximately 1 cwt. Subsequently the packages were cut down to about 56 lbs., then to 28 lbs., and now there is quite an appreciable trade done in small wooden boxes of sugar weighing only 14 lbs. or less. Of course, 1 cwt. of sugar put up in one package *must* be cheaper than the same quantity made up in eight small boxes, but sugar is retailed here by very small traders, and these small shopkeepers or hawkers of limited means, who can afford to buy only 10 to 20 lbs. at one time, are now getting the sugar in the small boxes at a cheaper price direct from the actual importer than they were formerly able to buy from the first middleman. This question of packages suitable for the small retailer is a very important one, as I feel sure you will understand from the above illustration, and it is one which our own people need to bear well in mind, not only as regards sugar but other goods sold by hawkers and small traders, in which the usual packages are at present large but which lend themselves to splitting up.

Matches.—Total value of 1911 imports £13,500, of which £3,700 from the United Kingdom, £8,200 from Germany, and £1,050 from Holland. To the best of my knowledge the real source of origin of the bulk of continental supplies is either Norway, Sweden, or Belgium, from which countries safety matches find their way to Nigeria in large quantities either via Hamburg or Rotterdam. The British matches which come out here are practically all of the "strike anywhere" variety. The import of these British matches is rather singularly confined to the Western (Lagos) Province, where they form practically one half of the total import, the value of such matches received at Lagos being £3,530 in 1911 as compared with a total at that port of £7,400. The value of British matches imported into the other two provinces of Southern Nigeria is negligible, being only £200 all told in 1911, whilst the total importations in the Central and Eastern Provinces were of the value of £6,000. Efforts have been made by the merchants to introduce the British non-safety matches into the Central and Eastern Provinces, but the natives in those districts show a very decided preference for safety matches, and practically no progress has been made with the other kind which is so popular in Lagos. One wonders if our British match makers could not produce a safety to compete with the type received via the Continent. These are, generally speaking, of reliable quality and are cheap, although I notice from the statistics that the declared cost of foreign matches is slightly higher than the British. These latter, however, are put up in very cheap cardboard boxes, but for the purely native trade I do not think this form of packing would necessarily kill the business, so long as the British safeties were good and cheap, and if the striking slips were affixed in such a manner as to serve properly to the end of the box in this climate. This is an important point, especially to the poorer consumers who want certain strikes for their money. It would also very materially help on the popularity of the British safeties if the makers could afford to put say half a dozen more matches in each box than are found in the best Norwegian boxes, and which usually contain 66 to 70 matches, although there are some less popular kinds here which have only 58 to 60 matches in the box. If it can be managed, I would suggest 72 to 76 as a suitable number. The Customs limit, by the way, for boxes of this size is 80 matches to the box, so suppliers must be careful not to exceed that number. If they do, an extra 3*d.* per gross boxes will be demanded, the ordinary duty for boxes not exceeding 80 being 6*d.* per gross.

I am putting forward this suggestion, as to the feasibility of British makers competing with the Norwegian, Swedish, and Belgian matches which are sent out here from the Continent, on the supposition that the freight on suitable match making timber to Liverpool would not be more, and probably would be much less, than the cost of transporting matches from Norway or Sweden to Hamburg. The freight from Liverpool to Nigeria is the same as from Hamburg. I also assume that our own people have the very latest labour saving machinery.

Haberdashery and Cotton Hosiery.—The total imports of these two classes from all sources in 1911 was £23,000, of which £11,300 came from the United Kingdom, £8,200 from Germany, and £2,300 from Holland. Cheapness and originality of design are said to account for the fact that practically half the goods imported in these classes are from the Continent.

Ale, Beer and Porter.—The imports mainly consist of light bottled beers. Total imports of beer in bottles in 1911 was £16,200, of which £8,200 came from the United Kingdom, £7,300 from Germany, and £600 from Holland. From Appendix "A" it will be seen that a much larger quantity of beer *in quarts* comes from Germany than from the United Kingdom, but in pints the position is reversed, two-thirds of the total supply coming from the United Kingdom. The total imports of beer *in pints* (not shown in Appendix "A") was £9,500 in 1911, of which £6,400 came from the United Kingdom, £3,000 from Germany and £100 only from Holland. Generally speaking, the continental brewers do not appear to find so great a demand for their light beers in pint bottles, and several brands can only be obtained in quarts. It is only a relatively small line, and as we have practically one half of the whole bottled trade, I personally consider the position in this class fairly satisfactory in face of the well deserved popularity of some continental brews. Our own people ship quart bottles as well as pints to this market, and no pertinent suggestions strike me as to means by which their trade can be enlarged.

"*Trade*" *Spirits.*—This is the last class of merchandise to which I desire to call attention, but so far as imports from the Continent are concerned it is the most important. The total value of Gin and Rum received in Southern Nigeria last year was £410,000, of which less than £12,000 came from the United Kingdom. The bulk of the total trade was secured by Holland and Germany whose respective shares were £304,000 and £93,000. Imports from the United Kingdom (apart from Whiskey which is not included in the above total) chiefly consist of Old Tom or Plymouth Gin for European or better class native consumption, and a certain quantity of barrel Rum (£3,000) which is almost entirely shipped to the Eastern Province.

SOUTHERN NIGERIA—*cont.*

For all practical purposes it may be stated that the distillers in the United Kingdom do not at present cater for the demand for cheap bottled spirits in these markets, and in some quarters there would appear to be very strong prejudice against the business in what is commonly termed "trade" spirit, this description being held in contempt as implying that the liquor sent out here from Rotterdam or Hamburg is generally of the worst possible type. This has been proved to be altogether too sweeping a view, but even assuming that "trade" spirits are of low quality, why should not the British distillers endeavour to place upon the market a better brand to drive the continental stuff out? There would not appear to be anything discreditable in making pure grain spirit in the United Kingdom, guaranteeing it as such, and shipping same to these markets to replace the Dutch or German liquor against which charges have so freely been levelled on account of the alleged low quality.

During the last two decades a considerable change for the better has been noticeable in the quality of spirits received from the continent. In the early nineties, although good quality Hamburg and Dutch Gin was even at that time being imported to an appreciable extent in the Central and Eastern Provinces, *the whole* of the liquor received in the Western (Lagos) Province was cheap Hamburg spirit. Towards the end of the nineties, one or two important firms of Dutch distillers attacked the Lagos trade with a better and dearer quality of spirit than that commonly shipped from Hamburg, and they have been so successful as to now supply over nine-tenths of the whole of the gin entering Lagos, viz. £117,000 value in 1911, as compared with only £10,000 from Hamburg. Is it not possible for the United Kingdom by the same methods, i.e. better quality, to secure some share of this trade?

A few years ago efforts were made from here to interest British distillers in the question of supplying cheap but sound grain spirit to these markets, but nothing came of it. We were given to understand that the exorbitant prices asked by the British glassmakers for bottles was in itself a very serious handicap, and that the restrictions placed upon the export spirit trade by the Revenue authorities and Dock Boards further tended to place our distillers at a disadvantage. At that time I gathered that there was no question as to the British distillers being able to produce a true grain spirit—immature, perhaps, but nevertheless genuine—at a reasonable figure, and the evidence given before the Whiskey Commission in 1908 would seem to bear this out, for it was then stated that Patent Still "silent" spirit was sold in the United Kingdom at so low a price as 1*s.* 1½*d.* per gallon.

Given equal facilities by the Revenue authorities and Dock Boards, it is difficult to understand why an up-to-date distillery could not be worked as economically at Liverpool as at Rotterdam, for the freights on maize and other raw materials would be approximately the same in either case. And glassmaking is one of the chief industries at St. Helens, only a few miles away from Liverpool.

I have shown that the Dutch distillers were able to break into the trade with a spirit of better quality and higher price than the ordinary run of German liquor, and that being the case one would think our own distillers might now have a chance even if their supplies were fractionally higher than those from Holland. Much can be done to popularise a slightly dearer article by some new flavouring matter, always provided the spirit is sound to commence with.

There is one point in connection with this spirit trade which I should like to mention, but I am not certain if I can make my meaning quite clear. It is with regard to the Customs Duty, which in 1892 (when *all* the Lagos "trade" spirits was imported from Hamburg) was only 1*s.* (one shilling) *per proof gallon.* To-day the duty levied is 5*s.* 6*d.* per gallon of a strength of 50 degrees Tralles, with an addition of 2½*d.* for every degree above 50, and a rebate of 1¼*d.* per degree below, and with a minimum charge of 4*s.* 6*d.* per gallon. With so low a duty as 1*s.* per gallon twenty years ago, it will be understood that the first cost of "trade" spirits in Europe was the principal factor dominating the selling price to the natives, and that a variation of 3*d.* or 6*d.* per case on the then local selling price made a much more appreciable difference than it does to-day with the duty at 5*s.* 6*d.* per gallon. My point is that the higher the duty, the more favourable the opportunity of introducing better quality spirits which may cost a little more. On the face of it, this may seem rather paradoxical, but I think you will agree that an increase of, say, 6*d.* per case (1 gallon) on 5*s.* would be enough to place the cheaper article completely out of court, whilst a difference of 6*d.* per case on selling values of 10*s.* to to 12*s.* might not prove an insuperable obstacle in the introduction of some better quality with a guarantee behind it.

The whole question would appear to be well worthy of consideration, and if anything can be accomplished by British distillers to secure (with a guaranteed pure grain spirit) a fair share of the South Nigerian liquor trade, which is now passing to the Continent to the extent of £400,000 per annum, it will make a useful addition to the trade of the United Kingdom.

GOLD COAST.

Colonial Secretary's Office,
Accra, Gold Coast.
14th October, 1912.

SIR,

IN accordance with the request contained in your letter of the 6th June, I have the honour to transmit to you, herewith, a report on British as compared with Foreign trade in the Gold Coast. Attached to it are three statements of trade.

I have, &c.,
C. H. HARPER,
Acting Colonial Secretary.

The Assistant Secretary,
(Commercial Department),
Board of Trade.

Memorandum on British as compared with Foreign Imports into the Gold Coast Colony.

General Statistics.—The total value, at port of entry, of all goods imported into the Gold Coast Colony during 1911 amounted to £3,784,259. Of this total, goods imported from the United Kingdom were valued at £2,842,895, or 75 per cent. of the whole; goods from British Colonies at £55,798, or over 1 per cent. of the whole, and goods from Foreign Countries at £885,566, or less than 24 per cent. of the whole.

2. Goods imported during this period on behalf of Government and Government Railways were valued at £140,221; specie at £881,091; and commercial imports, exclusive of specie, at £2,762,946.

3. Of commercial imports—the principal subject of the present inquiry—those from Foreign Countries were valued at £776,545 or 28 per cent. of the whole; from British Colonies at £37,285 or 1 per cent. of the whole; and from the United Kingdom at £1,949,116 or 70 per cent. of the whole. Since our statistics were classified in 1911 (for the first time) according to "countries whence consigned," the last figure may be taken as showing correctly the commercial imports that have been actually manufactured in the United Kingdom, or have passed through the British markets.

4. Of commercial imports from the United Kingdom, I estimate the value of those of British origin at £1,785,362 or 64 per cent. of the total commercial imports. This figure I consider indicates as nearly as possible the true position of British manufactures in the markets of the Colony.

5. *Foreign Competition.*—The accompanying three statements show the principal commercial imports in which articles of foreign origin have competed to any considerable extent with the corresponding articles of British origin during 1909, 1910 and 1911. Minor imports; classes of imports in which British goods practically enjoy a monopoly; imports on behalf of Government (which were nearly all of British origin), and goods such as flour, corkwood, rice, kerosene oil, lumber, rum, wines and unmanufactured tobacco, which do not compete with any British manufacture are excluded from these statements. These will be found in detail in the Blue Books of the Colony.

6. The following notes show in each case the nature of the competition :—

(a) *Agricultural and Gardening Implements.*—Imports from Germany and Holland are probably all of German origin, and consist principally of matchets and native hoes. These are of inferior quality and cheaper than the corresponding British articles. They are imported more largely from Germany than from England solely because the principal

importer is a German firm. The British articles when imported generally find a ready market, and that they are losing ground is due only to the neglect of the trade by the local British firms. The remedy is obvious, but the British manufacturer must not forget that particular types become popular or unpopular for no apparent reason, and that in order to capture and hold the trade, he must satisfy the requirements and very often the caprices of the local purchasers.

(b) *Ale and Beer.*—The only beer consumed in this Colony in any quantity is "lager." The stronger British beers do not keep well, and are too heavy for consumption in the Tropics. A British Lager is struggling for a place in the market, but it is not nearly so popular as the Munich and Pilsener varieties. British firms as well as German firms import their "lager" from Germany. If British manufacturers are to capture this trade, they must imitate the German article more closely than they do at present.

(c) *Beads.*—Practically all the beads imported here are of Austrian and Italian origin—even those imported from Germany and the United Kingdom. Austria succeeded Venice many years ago as the principal manufacturer of this commodity for the African market and so far no rival has seriously challenged her supremacy. Her manufacturers now have the advantage of long experience in the industry, but that they have any advantage from labour conditions, supplies of raw material, or any other condition incidental to the manufacture of beads is certainly far from obvious. Close touch with the market so as to be able to supply beads of the latest and most popular patterns is essential to success in this trade. "Fashion" rules the market and is quite as capricious here as it is in Europe. Birmingham beads, as far as I can ascertain, are not sold in this Colony.

(d) *Bags and Sacks.*—The imports from Germany correspond with the proportion of our cocoa crop that is sent to the German market.

(e) *Blue, Indigo.*—That imported from Germany has no advantage either as regards price or quality over the corresponding British article, and local British and German traders import from their respective countries. It will be noticed that Britain is gaining in this trade.

(f) *Bread and Biscuits.*—British biscuits maintain their supremacy, but during the last two years a cheap coarse biscuit imported from France, originally introduced by the local French traders, has taken a wonderful hold on the popular taste. British traders are now importing it, but they are also importing a very successful British imitation—a course they might pursue with advantage in several other directions.

(g) *Building Materials.*—The principal article imported from Germany is cement. This is of inferior quality and is imported only by German traders, who find it necessary to import also the superior and more popular British commodity. Foreign competition in this need not be feared. In the current year (1912), owing to the labour unrest in England, a considerable amount of German cement has been imported. Imports from Holland are probably of German origin.

(h) *Candles.*—Imports from Belgium, Germany and Holland are of cheap inferior varieties which are generally made up in fancy colours, and are introduced almost exclusively by German and other foreign traders. The competition in this article is declining and need not be feared.

(i) *Coopers' Stores.*—Those imported from Holland are probably of German origin, and with those imported from Germany make up a total that corresponds only to the proportion of our palm oil exports sent to the German market.

(j) *Cotton Yarn and Twist.*—Imports from Germany consist principally of coarse yarns used in the Quittah district for the manufacture of "Quittah cloths." They are introduced almost exclusively by German traders. Britain is gaining ground in this trade.

(k) *Cotton Manufactures.*—British cottons retain their supremacy and are imported by German as well as by British traders. There is a coarse German cloth, however, that has become very popular on account of the stability of its colours. It is imported by British as well as by German firms, and is generally printed after English designs. A still more popular cloth of somewhat finer texture, made and printed in Holland, is also imported here by British as well as by foreign traders. It has attained its popularity too on account of the stability of its colours, and like the German cloth it is generally printed after English designs.

It is quite impossible to advise the British manufacturer as to how he should protect his designs so as to prevent his foreign competitors from using them. Registration in the Colony would not be sufficient, as a given merchant might easily be selling at one and the same time a British, a Dutch, and a German cloth, all of the same pattern,

and as most of his competitors would be doing likewise, nobody would be likely to invoke the assistance of the law on behalf of the British manufactured article. Even if the law were invoked, the forger could escape by making a few immaterial alterations in the original design.

(l) *Drugs and Chemicals.*—The principal import from Germany consists of patent medicines, introduced almost exclusively by German traders. This trade is well worth the attention of British manufacturers. The native is an inveterate consumer of patent medicines, and a large trade might be obtained in any medicine that succeeded in acquiring a local reputation.

(m) *Furniture.*—Imports from Germany consist principally of bentwood chairs and sofas. These are imported from Germany by British as well as by foreign traders, and I understand their manufacture is a German speciality. In the trade as a whole Britain is no more than maintaining her position.

(n) *Hardware.*—Imports from Germany and Holland consist largely of enamelled iron vessels—the manufacture of which seems to be a German speciality. At present practically all the enamelled vessels in this market are imported from Germany. Cheap cutlery and cheap sewing machines also are largely imported from Germany, but almost entirely by German traders. Both those lines are well worth closer attention from British manufacturers.

(o) *Musical Instruments.*—Imports from Germany consist principally of portable organs, concertinas, mouth organs, cheap band instruments and such goods. Those lines are German specialities and local British traders are forced to import them from Germany. The trade as a whole is developing rapidly, and British goods are more than holding their own.

(p) *Mineral Waters.*—Imports from France consist principally of the well known "Perrier," and those from Germany largely of the equally well known but less popular "Saurbrunen." These are imported by British as well as by foreign traders. Germany also supplies a very popular lemonade which is imported by firms of all nationalities.

Britain is losing ground in this trade, and she can regain it only by imitating the foreign lines that are already popular in the market, or by inventing new lines of her own to suit the popular taste.

(q) *Perfumery.*—Imports from Germany and Holland consist of very cheap and inferior oils, fats, and water, coloured, scented and made up in most attractive looking packages to catch the popular fancy. British traders import these largely from Germany. This trade is expanding rapidly, and while Britain has secured the greater proportion of the increase, she could easily do better. Attractive looking receptacles are essential to success, and in making up these the German manufacturer is easily first. Again British manufacturers do not imitate successful German lines, while Germans very quickly imitate successful British ones.

(r) *Provisions.*—Importations from Germany and Holland consist principally of sausages, tinned meats and cheese. Most of these are German and Dutch specialities. A "natural milk" from Germany has become very popular lately, and is imported by British as well as by German firms. "Natural milk" generally is growing in favour, but I have not seen an English brand on the market. Tinned butter, too, is getting a hold on the popular taste.

(s) *Salt, Coarse.*—French salt enjoys no advantage over the English variety, either in price or quality, but is preferred in districts where it has been long established. British as well as foreign merchants import it for those districts.

(t) *Flint Lock Guns.*—Holland and Belgium are the principal suppliers. I cannot discover any adequate reason for this. The trade is worth the attention of British manufacturers. The apparent decline in the imports from the United Kingdom is due to the classification of imports in 1911 according to "countries whence consigned" instead of "countries whence imported" as was the case in previous years.

(u) *Spirits—Gin.*—Probably 90 per cent. of the gin imported here is of the "trade" variety and is manufactured almost exclusively in Holland. It is a Dutch speciality and has held the market here for many years, but it is gradually losing hold on the popular taste—which has turned lately to American rum. British manufacturers have never shown any inclination to compete in this commodity.

(v) *Sugar.*—German sugar has some advantage in price, if not in quality, over British sugar, and it has a considerable hold on the popular taste. British as well as German traders import. The British manufacturer is losing ground in this trade, and is likely to lose still further unless he can supply a cheaper article.

GOLD COAST—*continued.*

(w) *Tobacco, Manufactured.*—Imports from Germany and Holland consist exclusively of cheap inferior cigars, of kinds that are not manufactured in the United Kingdom. The trade in manufactured tobacco as a whole is expanding rapidly, and it is satisfactory to note that nearly the whole of the increase of the last three years has gone to the United Kingdom.

(x) *Wearing Apparel.*—Imports from Germany and Holland consist principally of cheap singlets, shirts, collars, underwear and ready-made clothing: lines which are very popular here and which are well worth closer attention from British manufacturers. British traders import them from Germany, which they would not do if they could procure similar lines in England.

7. *Samples.*—I have purchased a number of samples of the foreign goods referred to in the foregoing notes, and I will send them in due course to the Board of Trade, labelled in each case with the retail price in the local market.* These may be useful to present or prospective British competitors. I shall be glad at any time to send given samples of other foreign goods if asked to do so, and to give any further available information as to any particular feature of foreign competition.

8. *Commercial Travellers.*—As far as can be ascertained here, none of the foreign competition is induced or supported by bounties in the countries of origin. Neither has it any advantage from superior representation by commercial travellers. Of course commercial travellers both British and foreign visit the Colony, but the amount of trade they obtain is a negligible fraction of the whole, and is likely to remain so. It is carried on as a rule through a bank with petty traders—a class with an abnormally low standard of commercial morality—and any supplier who takes it up must do so under substantial guarantees, or at considerable risk. It must not be inferred, however, that local canvassing by commercial travellers is useless. A keen traveller can always obtain useful information for his principals and keep them in touch with local requirements; and there are several small traders prepared to give all necessary guarantees, and to carry on a profitable trade with any manufacturer who can supply them with good selling articles.

9. The bulk of the canvassing for trade for this Colony is done in Europe where nearly all our important trading firms have their headquarters. These headquarter branches are nearly always the buying branches of their firms, and they are generally managed by men who have full experience of West African trade, and who would be likely to give every encouragement to any manufacturer who could put up a suitable line for their market. The best advice I can give to British manufacturers is to introduce their wares in the first instance to one of these buying branches.**

10. *General Remarks.*—It has been stated that British trade in this Colony suffers because the British trader keeps up a more elaborate and expensive establishment than his foreign competitor, and because his headquarter branch in England invoices goods to him at too high a rate in order to cut down his commission. I cannot find the least evidence of this, and the best answer to it is that notwithstanding such supposed handicaps the British trader more than maintains his ground, and places his goods on the market at least as cheaply as his foreign competitor.

11. It has also been said that British trade suffers from the reluctance or tardiness of principals in England to take the advice of their Agents in the Colony as to the supply of new lines or the variation of old ones. While this may be true in individual instances, there is not the least evidence that, on the whole, the British trading firm is wanting either in foresight or in enterprise.

12. Taking the Import trade of the Colony as a whole there is not the least reason for the British supplier to be dissatisfied with his position. He has held his ground in all his staple commodities, and he has taken the lion's share of all important increases. Of the strength and enterprise of his most formidable rival, the German, who incidentally is the Colony's next best customer, he seems fully aware and appreciative. In this lies the hope of the future. For every pound the German has gained in the last three years he has gained seventeen, and there is every reason to believe that, in the future, he will increase rather than lose his advantages.

O. MITCHELL,
Acting Comptroller of Customs.

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* These samples may be seen by British manufacturers and shippers of British goods on application to the Commercial Intelligence Branch of the Board of Trade, 73, Basinghall Street, London, E.C.

** A list of the principal British firms in the Colony, and where possible the names and addresses of their representatives in England may be obtained on application to the Commercial Intelligence Branch of the Board of Trade.

TABLE I.

PRINCIPAL COMMERCIAL IMPORTS in which ARTICLES of FOREIGN ORIGIN have competed seriously with the corresponding ARTICLES of BRITISH ORIGIN in the GOLD COAST COLONY during 1909.

Principal Articles.	United Kingdom.		British Possessions.		Germany.		France.		Holland.		United States.		Other Foreign Countries.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£		£		£		£		£		£		£		£
Agricultural and gardening implements.	—	2,581	—	—	—	4,756	—	—	—	3,705	—	—	—	8	—	11,050
Ale, beer and porter ... gals.	24,853	4,283	—	—	43,796	6,145	—	—	1,513	250	—	—	4	2	70,166	10,680
Bags and sacks ...	—	10,166	—	85	—	4,965	—	—	—	406	—	—	—	322	—	15,944
Beads	—	6,759	—	834	—	12,963	—	1	—	195	—	—	—	2,708	—	23,460
Blue, indigo ... lbs.	83,687	1,883	12	1	182,232	3,187	—	—	37,591	696	—	—	1,294	14	304,816	5,781
Bread and biscuits cwts.	6,198	7,702	1	2	60	78	547	714	42	53	—	—	43	58	6,891	8,607
Building materials ...	—	20,251	—	22	—	2,178	—	26	—	984	—	—	—	34	—	23,495
Candles... ... lbs.	465,878	9,181	—	—	90,978	2,101	2,283	52	300,461	5,953	—	—	—	—	859,600	17,287
Coopers' stores... pkgs.	8,243	15,590	215	252	1,166	1,476	724	937	230	657	—	—	213	211	10,791	19,123
Cotton manufactures :																
Yarn and twist lbs.	124,105	7,289	678	48	89,449	4,663	—	—	111,236	6,047	—	—	37,130	2,317	362,598	20,364
Cotton goods (excluding yarn and twist).	—	322,912	—	14,501	—	33,210	—	110	—	40,742	—	—	—	12,283	—	423,758
Drugs and chemicals	—	12,768	—	76	—	2,356	—	55	—	144	—	—	—	54	—	15,453
Furniture	—	11,600	—	696	—	5,805	—	288	—	250	—	—	—	255	—	18,894
Guns, flint-lock No.	1,313	826	5	5	471	236	—	—	2,334	1,119	—	—	1,196	874	5,319	3,060
Hardware	—	34,921	—	124	—	14,298	—	75	—	6,428	—	—	—	757	—	56,603
Instruments, musical	—	4,851	—	42	—	1,508	—	85	—	130	—	—	—	20	—	6,636
Mineral and aërated waters. doz. bts.	20,694	3,931	—	—	40,884	6,581	963	197	1,804	283	—	—	848	198	65,193	11,190
Perfumery	—	9,371	—	66	—	8,766	—	52	—	6,559	—	—	—	196	—	25,010
Provisions	—	101,748	—	129	—	11,276	—	538	—	4,375	—	—	—	500	—	118,566
Silk goods manufactures, broad stuffs of silk or satin. yds.	21,224	1,022	1,444	119	19,484	466	—	—	4,169	206	—	—	631	68	46,952	1,881
Spirits, gin ... gals.	12,726	3,730	13	4	17,864	2,834	—	—	373,829	50,218	—	—	1,632	268	406,064	57,054
Spirits, rum ... „	652,137	49,235	527	170	45,632	3,805	22	6	16,004	2,378	—	—	27,607	1,933	741,929	57,527
Sugar ... ... cwts.	12,954	14,243	30	16	13,561	11,001	176	183	438	442	—	—	358	365	27,517	26,250
Tobacco, manufactured lbs.	54,117	14,613	140	63	6,607	2,012	67	19	6,259	1,293	—	—	303	48	67,493	18,048
Wearing apparel ...	—	59,169	—	1,367	—	6,087	—	120	—	1,974	—	—	—	2,025	—	70,742
Total	—	730,625	—	18,622	—	152,753	—	3,458	—	135,487	—	—	—	25,518	—	1,066,463

TABLE II.

PRINCIPAL COMMERCIAL IMPORTS in which ARTICLES of FOREIGN ORIGIN have competed seriously with the corresponding ARTICLES of BRITISH ORIGIN in the GOLD COAST COLONY during 1910.

Principal Articles.	United Kingdom.		British Possessions.		Germany.		France.		Holland.		United States.		Other Foreign Countries.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.		£ s. d.
Agricultural and gardening implements.	—	3,627 18 8	—	—	—	6,553 4 4	—	7 6 2	—	3,413 7 6	—	—	—	13 9 3	—	13,615 5 11
Ale, beer and porter ... gals.	29,858	5,100 3 10	11	2 9 3	67,474	9,266 10 11	—	—	943	146 8 3	—	—	4	0 18 0	98,290	14,516 10 3
Bags and sacks ...	—	12,492 17 9	—	194 4 9	—	7,160 4 1	—	165 6 0	—	636 8 8	—	—	—	352 14 5	—	21,001 15 8
Beads	—	4,276 9 6	—	530 9 7	—	19,782 6 11	—	—	—	94 9 1	—	—	—	3,082 14 5	—	27,766 9 6
Blue, indigo ... lbs.	109,999	3,122 17 5	103	2 2 8	167,028	3,221 5 8	—	—	70,490	823 7 8	—	—	1,061	17 6 4	348,681	7,186 19 9
Bread and biscuits cwts.	11,594	14,317 0 8	38	74 12 3	359¼	434 13 3	2,447	2,934 14 11	87	116 14 11	—	—	82	111 0 9	14,607½	17,988 16 9
Building materials ...	—	30,984 5 8	—	0 3 0	—	2,650 14 2	—	122 16 7	—	1,593 14 3	—	—	—	763 8 7	—	36,115 2 3
Candles... ... lbs.	672,906¼	11,800 10 8	54	1 0 8	15,364	320 17 10	1,118	34 14 9	346,403	7,180 7 1	—	—	22,000	447 15 6	1,057,845¼	19,785 6 6
Coopers' stores... pkgs.	11,521	21,558 2 0	—	—	2,846	4,379 9 6	1,977	1,932 8 0	1,215	2,794 0 9	—	—	171	188 16 2	17,730	30,852 16 5
Cotton manufactures:																
Yarn and twist. lbs.	59,104½	4,106 13 1	329	22 13 11	108,958	5,730 17 4	—	—	163,485½	10,100 3 1	—	—	28,151	1,791 1 6	360,028	21,751 8 11
Cotton goods (excluding yarn and twist).	—	497,220 10 6	—	11,814 4 2	—	39,295 3 7	—	381 8 0	—	89,150 17 2	—	—	—	16,183 12 10	—	654,045 16 3
Drugs and chemicals	—	19,188 5 4	—	71 19 6	—	4,306 17 1	—	30 8 9	—	153 19 3	—	—	—	79 3 11	—	23,830 13 10
Furniture	—	18,166 17 6	—	510 9 11	—	9,461 1 7	—	50 5 6	—	332 3 3	—	—	—	378 9 8	—	28,899 7 5
Guns, flint-lock No.	7,140	4,398 3 10	5	3 9 5	130	63 15 3	—	—	4,849	2,286 4 9	—	—	270	136 9 2	12,394	6,888 2 5
Hardware	—	54,781 17 9	—	169 11 7	—	22,757 19 10	—	103 1 5	—	9,214 3 5	—	—	—	1,496 11 8	—	88,523 5 8
Instruments, musical	—	9,378 6 5	—	81 12 0	—	3,171 7 5	—	21 1 10	—	279 15 4	—	—	—	53 8 4	—	12,985 11 4
Mineral and aërated waters. doz. bts.	31,582 1/12	5,387 11 0	9	1 5 2	59,135 1/12	9,977 7 2	1,694	439 2 5	2,604⅔	423 11 6	—	—	2,505	669 4 3	97,520	16,898 1 6
Perfumery	—	14,462 8 0	—	38 19 0	—	13,818 7 5	—	63 5 5	—	8,898 14 6	—	—	—	347 3 5	—	37,628 17 9
Provisions	—	128,189 12 5	—	174 9 3	—	15,038 8 6	—	1,647 5 11	—	6,619 16 5	—	—	—	690 18 1	—	152,360 10 7
Silk goods manufactures, broad stuffs of silk or satin. yds.	26,702½	1,843 12 6	209	15 17 0	22,958¼	583 4 5	599	30 12 8	11,316	261 1 0	—	—	1,963	112 13 7	63,747¾	2,847 1 2
Spirits, gin ... gals.	22,080	6,324 10 7	69	29 7 11	13,539	2,213 13 8	35	4 6 6	463,085	60,812 13 0	—	—	131	21 2 4	498,939	69,405 14 0
Spirits, rum ... „	907,329	70,201 5 8	443	141 3 8	81,641	6,937 4 4	659	67 9 1	21,229	2,986 10 0	—	—	28,663	1,955 11 1	1,039,964	82,289 3 10
Sugar ... ... cwts.	16,702¼	20,039 5 6	25	21 5 5	19,094	17,677 19 11	80	98 18 6	209	240 14 8	—	—	125½	103 10 2	36,235¾	38,181 14 2
Tobacco, manufactured lbs.	87,640	26,143 5 6	112	57 3 1	8,143	2,265 16 9	216	83 9 7	10,028	1,979 15 8	—	—	337	82 10 4	106,476	30,612 0 11
Wearing apparel ...	—	81,263 0 4	—	1,485 18 2	—	8,140 17 2	—	301 3 0	—	4,940 13 6	—	—	—	4,114 3 3	—	100,245 15 5
Total	—	1,068,375 12 1	—	15,444 11 4	—	215,209 8 1	—	8,519 5 0	—	215,479 14 8	—	—	—	33,193 17 0	—	1,556,222 8 2

TABLE III.

PRINCIPAL COMMERCIAL IMPORTS in which ARTICLES of FOREIGN ORIGIN have competed seriously with the corresponding ARTICLES of BRITISH ORIGIN in the GOLD COAST COLONY during 1911.

Principal Articles.	United Kingdom.		British Possessions.		Germany.		France.		Holland.		United States.		Other Foreign Countries.		Total.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
		£		£		£		£		£		£		£		£
Agricultural and gardening implements.	—	2,635	—	—	—	6,020	—	1	—	2,339	—	119	—	—	—	11,114
Ale, beer and porter ... gals.	31,999	5,252	8	2	73,865	10,332	435	62	3,298	493	2,109	383	1,798	299	113,512	16,823
Bags and sacks ...	—	20,034	—	2,333	—	9,656	—	—	—	618	—	—	—	315	—	32,956
Beads	—	5,501	—	961	—	13,415	—	76	—	28	—	—	—	17,670	—	37,651
Blue, indigo ... lbs.	160,693	5,018	—	—	117,357	2,226	31,237	483	39,051	583	—	—	19,139	241	367,477	8,551
Bread and biscuits cwts.	8,445¼	10,220	14	24	276	369	6,663	8,343	124	169	11	12	31	55	15,564¼	19,192
Building materials ...	—	33,227	—	—	—	3,224	—	53	—	1,336	—	559	—	339	—	38,738
Candles... ... lbs.	769,986	12,141	3,700	51	71,883	1,393	1,698	35	271,591	5,391	—	—	172,031	3,200	1,290,889	22,211
Coopers' stores... pkgs.	7,147	12,274	—	—	531	1,331	420	574	307	1,683	—	—	7	21	8,412	15,883
Cotton manufactures:																
Yarn and twist. lbs.	268,397½	13,771	1,061	109	63,915	4,068	1,078	73	20,555½	1,421	—	—	36,002	1,880	381,009	21,322
Cotton goods (excluding yarn and twist).	—	538,454	—	15,121	—	40,564	—	1,037	—	43,727	—	17	—	15,988	—	654,908
Drugs and chemicals	—	16,686	—	16	—	5,414	—	137	—	192	—	716	—	193	—	23,354
Furniture	—	20,348	—	473	—	10,735	—	261	—	449	—	687	—	1,123	—	34,076
Guns, flint-lock No.	3,691	2,166	1	2	339	170	740	391	6,996	3,312	—	—	7,562	3,710	19,329	9,751
Hardware	—	65,950	—	217	—	26,460	—	391	—	9,171	—	1,290	—	2,108	—	105,587
Instruments, musical	—	13,833	—	63	—	4,577	—	190	—	195	—	51	—	94	—	19,003
Mineral and aërated waters. doz. bts.	28,715	5,478	—	—	68,478 7/12	11,968	6,147 10/12	1,547	1,471 4/12	217	—	—	63 10/12	15	104,876 7/12	19,225
Perfumery	—	18,498	—	81	—	14,021	—	326	—	5,361	—	869	—	574	—	39,730
Provisions	—	129,777	—	4,587	—	12,114	—	1,132	—	4,612	—	2,991	—	8,554	—	163,767
Silk goods manufactures, broad stuffs of silk or satin. yds.	53,498¾	3,058	276	14	1,695	81	—	—	1,337	83	—	—	445	25	57,251¾	3,261
Spirits, gin ... gals.	27,118	7,130	938	85	5,869	1,040	104	32	522,087	70,776	—	—	14	4	556,130	79,067
Spirits, rum ... „	47,040	3,884	1,202	304	56,412	4,647	678	53	35,153	4,308	781,472	63,358	36,359	2,446	958,316	79,000
Sugar ... ... cwts.	13,145¾	14,367	25	23	17,388¼	16,002	77	76	194	196	—	—	108¾	120	30,938¾	30,784
Tobacco, manufactured lbs.	96,974	29,270	364	93	10,623	3,094	374	85	8,545	1,556	929	299	224	46	118,033	34,443
Wearing apparel ...	—	63,282	—	1,433	—	12,831	—	783	—	2,356	—	181	—	5,221	—	86,087
Total	—	1,052,254	—	25,992	—	215,752	—	16,141	—	160,572	—	71,532	—	64,241	—	1,606,484

SIERRA LEONE.

COLONIAL SECRETARY'S OFFICE,
SIERRA LEONE.
9th July, 1912.

SIR,

I HAVE the honour to acknowledge the receipt of your letter of the 6th June requesting to be furnished with certain information in regard to the present position of British trade in this Colony and the Protectorate, and the means by which that trade may be developed in the future.

2. In compliance with your request, I have the honour to transmit to you a copy of a report which has been prepared by the Collector of Customs, at my request, which, together with the tables attached to it, will, I hope, furnish the information desired on the various points mentioned in your letter.

I have, &c.,
E. EVELYN,
Acting Colonial Secretary.

The Assistant Secretary,
(Commercial Department),
Board of Trade.

MEMORANDUM.

I submit the following statement on the several points raised by the Board of Trade.

2. From Appendix A, showing the Direction of Import trade with this Colony for the last three years, it will be seen that in the aggregate the United Kingdom enjoys an enormous advantage.

3. In various articles, the manufacture of which is common to the United Kingdom and to certain Continental Countries, the latter to a great extent command the market. Appendix B gives a list of such articles with the countries from which they are consigned. As the country of consignment is not necessarily the country of origin, it follows that it is not always the country which competes in manufacture. This is illustrated by the item "beads."

4. *Beads.*—Samples and catalogues appear to indicate that beads suitable for the West African Market can be obtained at considerably less cost from Austria, through Germany, than from the United Kingdom. The large extent of their trade in beads enables the Continental Shippers to grant better terms to West African Traders than can possibly be conceded by British Manufacturers. Hamburg is the principal port of shipment for goods from the whole of the Continent to this place and the small cost of transit by the large waterways in Germany no doubt exercises a considerable influence in determining the ultimate cost of many Continental manufactures. In the case of beads, it is cheapness of production rather than the popularity of a showy but inferior article which enables foreign made goods to hold the market.

5. With regard to *Cutlery*, *Jewellery*, *Glassware* and *Perfumery*, in all of which the importations from Germany largely exceed those from the United Kingdom, there are for these goods two distinct classes of customers, one consisting of Europeans and the superior natives, the other, which is much the larger, wholly of natives. The former derives its supply mainly from the United Kingdom, which provides goods of generally better quality. The latter demands goods which are attractive in appearance and low in price and in order to meet this demand quality must perforce be sacrificed. Particularly is this so in the case of *Perfumery*. By reason of its extremely low cost the strong spirit made in Germany enables the German Manufacturer to produce certain kinds of perfume at a price with which a Manufacturer of the United Kingdom cannot possibly compete. It is stated that none of the cheap classes of the above-named articles can be manufactured in the United Kingdom at an equally low cost as in Germany and other Continental Countries.

6. *Matches.*—As is well known, Norway and Sweden are very large sources of supply of this article and these countries are responsible for the great bulk of importation which is credited to Germany, the country of consignment.

SIERRA LEONE—*cont.*

7. Figures showing the importation of *Tobacco* and certain *Spirits* have been included in Appendix B—as it is thought, the information may possibly be of use. Tobacco imported into Sierra Leone is entirely of American origin, the various countries shown in the Table being countries of Consignment.

8. Commercial Travellers have probably not had much to do with the success or otherwise of firms doing business in Sierra Leone. A few who on their first entrance to the Colony were simply Travellers have remained as Local Agents of the Firms they represented, others have appointed Local Agents. In their adopted positions they are enabled to send to their head-quarters a continuous stream of reliable information regarding local conditions and requirements. Each new agency established naturally extends the ramifications of trade with West Africa. The Commercial Travellers who visit the West Coast of Africa in many instances represent firms which already do business on the Coast and seek to increase their connexion. The new agencies previously referred to represent foreign firms, and in this respect the foreign manufacturer has been better represented in the Colony of Sierra Leone than his British competitor.

9. I am not aware of the existence of any Government bounties which in any way affect the trade of any foreign Country with this Colony.

10. France and Germany are well represented in the Commercial life of the Colony and it may be assumed that business is fairly equally distributed between firms of these two countries and firms of the United Kingdom. The trade of one firm is almost exactly similar to that of another. Similar goods are stocked and sold by each and it would be commercially suicidal for any one firm to try to carry on business successfully while confining itself to the exploitation of the manufactures of its own country to the exclusion of those of other nationalities.

11. The Compagnie Française de l'Afrique Occidentale, which is one of the leading firms of the Colony, goes perhaps further than any of its rivals in encouraging the sale of its nation's manufacture. Several times a year their own trading steamer brings to the Colony a cargo of goods consigned to themselves and consisting almost entirely of goods produced or manufactured in France.

12. Generally the opinion of local Merchants is that the catalogues and price lists of goods of non-British (notably of German) origin are much more informative than those emanating from the United Kingdom. No detail is omitted which may be of use to the possible customer. It is even stated that when goods are ordered from a Continental price list the purchaser knows beforehand exactly what he will receive and that this is seldom possible when an indent is made from a British price list, owing to insufficiency of detail.

A. P. VIRET,
Collector of Customs.

APPENDIX A.

TABLE showing the Import-Trade of the Colony of Sierra Leone for the Three Years ending 31st December, 1911.

Country whence Imported.	Imports.		
	1909.	1910.	1911.
	£	£	£
United Kingdom	700,233	874,943	950,815
British West African Possessions	52,580	30,654	36,043
British Possessions (Other)	80	33	37
France	3,795	2,956	11,221
Germany	95,155	134,629	142,169
Holland	28,061	44,125	57,393
Other European Countries	1,969	2,529	1,609
United States of America	35,235	4,589	10,705
Foreign West African Possessions	48,116	47,530	27,825
Other Countries	9,357	20,482	29,414
Grand Total	974,581	1,162,470	1,267,231

NOTE.—The above figures include "specie."

APPENDIX B.

TABLE showing the Countries whence certain articles were imported into the Colony of Sierra Leone in the Three Years ending 31st December, 1911.

	1909.		1910.		1911.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Beads.—		£		£		£
United Kingdom	—	416	—	484	—	527
British West African Possessions	—	5	—	7	—	1
France	—	8	—	—	—	—
Germany	—	5,800	—	8,753	—	8,220
Holland	—	756	—	931	—	814
Other European Countries ...	—	—	—	86	—	—
Foreign West African Possessions	—	17	—	33	—	102
Other Countries	—	8	—	140	—	40
Total	—	7,010	—	10,434	—	9,704
Cutlery:—						
United Kingdom	—	879	—	1,510	—	1,285
British West African Possessions	—	2	—	5	—	—
France	—	31	—	20	—	32
Germany	—	3,453	—	3,796	—	3,189
Holland	—	384	—	1,029	—	1,627
Other European Countries ...	—	6	—	—	—	—
United States of America... ...	—	—	—	—	—	1
Foreign West African Possessions	—	30	—	26	—	18
Other Countries	—	4	—	—	—	—
Total	—	4,789	—	6,386	—	6,152
Glassware:—						
United Kingdom	—	764	—	661	—	542
British West African Possessions	—	8	—	8	—	16
France	—	129	—	15	—	3
Germany	—	605	—	535	—	1,070
Holland	—	138	—	205	—	332
Other European Countries ...	—	63	—	40	—	38
Foreign West African Possessions	—	18	—	17	—	10
Other Countries	—	—	—	—	—	1
Total	—	1,725	—	1,481	—	2,012
Jewellery:—						
United Kingdom	—	84	—	474	—	399
British West African Possessions	—	—	—	1	—	—
British Possessions (Other) ...	—	—	—	—	—	5
Germany	—	178	—	1,289	—	2,936
Holland	—	45	—	57	—	253
Other European Countries ...	—	—	—	1	—	—
Foreign West African Possessions	—	1	—	13	—	18
Other Countries	—	22	—	23	—	13
Total	—	330	—	1,858	—	3,624
Matches:—						
United Kingdom	—	110	—	35	—	194
Germany	—	1,715	—	2,397	—	2,146
Holland	—	128	—	13	—	74
Other European Countries ...	—	—	—	32	—	—
Foreign West African Possessions	—	—	—	—	—	1
Other Countries	—	—	—	4	—	—
Total	—	1,953	—	2,481	—	2,415

SIERRA LEONE—*cont.*

APPENDIX B—*cont.*

	1909.		1910.		1911.	
	Quantity.	Value.	Quantity.	Value.	Quantity.	Value.
Tobacco, Unmanufactured:—	Lbs.	£	Lbs.	£	Lbs.	£
United Kingdom	1,487,742	40,519	1,842,236	50,601	1,785,297	48,487
British West African Possessions	—	—	152	8	23	1
Germany	62,720	1,706	28,213	925	116,347	3,192
Holland	—	—	7,428	202	—	—
United States of America... ...	403,200	12,397	20,272	438	68,805	1,809
Foreign West African Possessions	4,480	93	686	33	5,011	147
Total	1,958,142	54,715	1,898,987	52,207	1,975,483	53,636
Perfumery:—						
United Kingdom	—	2,786	—	2,797	—	3,298
British West African Possessions	—	5	—	20	—	37
France	—	178	—	7	—	50
Germany	—	3,605	—	5,704	—	4,788
Holland	—	743	—	1,983	—	1,640
Other European Countries ...	—	2	—	—	—	2
United States of America... ...	—	11	—	—	—	2
Foreign West African Possessions	—	96	—	27	—	52
Other Countries	—	2	—	19	—	—
Total	—	7,428	—	10,557	—	9,869
Spirits:—						
Brandy:—	Imp. Galls.		Imp. Galls.		Imp. Galls.	
United Kingdom	909	757	918	796	1,458	1,174
British West African Possessions	1	1	—	—	—	—
France	237	252	9	8	166	163
Germany	1,383	412	3,396	783	3,322	690
Holland	—	—	171	28	18	3
Other European Countries ...	3	2	—	—	—	—
Foreign West African Possessions	62	66	42	40	2	1
Total	2,595	1,490	4,536	1,655	4,966	2,031
Geneva:—						
United Kingdom	6,879	1,919	9,210	2,296	7,496	2,535
British West African Possessions	2	1	—	—	1	1
Germany	67,114	10,430	94,695	14,685	92,072	22,654
Holland	69,216	11,121	123,879	17,826	161,959	23,974
Foreign West African Possessions	—	—	2	2	5	2
Other Countries	—	—	174	25	—	—
Total	143,211	23,471	227,960	34,834	261,533	49,166
Rum:—						
United Kingdom	61,579	4,778	60,543	4,611	67,100	5,093
British West African Possessions	—	—	—	—	1	1
France	70	40	126	66	94	52
Germany	41,961	4,974	77,023	8,586	63,880	6,956
Holland	16,008	1,615	10,895	1,174	16,905	2,186
United States of America... ...	108	33	—	—	—	—
Foreign West African Possessions	62	37	366	91	67	34
Other Countries	2,468	136	1,728	119	3,141	222
Total	122,256	11,613	150,681	14,647	151,188	14,544

GAMBIA.

RECEIVER GENERAL'S OFFICE,
BATHURST, GAMBIA.
21st August, 1912.

SIR,

I HAVE the honour to acknowledge the receipt of your letter of the 6th June, relating to the present position of British trade in Crown Colonies and Protectorates, and the means by which that trade may be developed in future.

In reply, I beg to transmit herewith an extract from the Government Gazette Extraordinary, of 23rd July last (Appendix A), which contains a comparative statement of the quantities and values of Imports from Great Britain and the principal Foreign Countries.

It will be seen from this return, that those articles of any importance in which the importation from Foreign Countries exceeds that from Great Britain, are :—

(1) Wine,
(2) Sugar,
(3) Rice,
(4) Spirits.

1. The bulk of the wine imported would probably in any case be exported from France, that being the country of its origin.

2. The sugar is of an inferior quality, but it is cheap.

3. The rice imported comes originally from the East Indies, and the quality is very inferior.

The importation of rice from Germany during 1911 exceeds that from Great Britain and France put together, and it is worthy of notice that the quantity imported from Germany during the past three years has increased 300 per cent., while that from Great Britain shows an increase of little more than 100 per cent. during the same period.

4. The excess in the importation of spirits from Germany is due to the fact that cheap trade gin made in Germany is the principal spirit consumed.

The only imports into this Colony from Great Britain which exceed those from Foreign Countries are :—

(1) Cotton Goods,
(2) Gunpowder.

The importation of the latter commodity is a very small asset, from a commercial point of view.

The former is by far the largest and most important importation into the Colony.

The figures on the extract transmitted herewith, show that the importation from Great Britain is larger than the aggregate quantity derived from all other sources, but it is a significant fact that while the importation during 1911 from Great Britain shows a decrease of more than 10 per cent. from that of 1910, the importation from France has, on the other hand, increased more than 60 per cent. during the same period ; and Imports from both France and Germany show a constant increase during the past three years.

Roughly speaking the whole of the decrease in the importation of cotton goods from Great Britain during the last year has been captured by France and Germany, and were it to progress in the same proportion the cotton goods trade with the Colony would, in very few years, be entirely in the hands of the two latter countries.

Generally speaking the tendency to success of foreign competition is principally due to the facts that :—

1. There is only one English firm in this Colony, and that the remaining European firms are French. These latter are really branches of French houses which have their headquarters in France, from whom they receive the bulk of their merchandise.
2. These firms employ, to a large extent, chartered boats which bring their imports and take their exports at a cheaper rate of freight than could be obtained from the one British line of steamers (Elder, Dempster & Co.) which runs from the United Kingdom to this port, against whom there exists no competition, whose service is not regular as to date of arrival, departure, &c., and whose freights have recently been raised 10 per cent.
3. To the inferior goods at cheap prices to suit the purse and taste of the consumers, who are mostly natives.
4. To the fact that the bulk of the staple product of this Colony (ground nut) is taken by France, a factor which has no doubt probably facilitated commercial relations between merchants here and in that country.

GAMBIA—*cont.*

I enclose a statement (Appendix B.) showing the proportions of certain articles obtained from Great Britain in 1899 as compared with 1911.

I have, &c.,
CLINTON GREIG,
For *Receiver General.*

The Assistant Secretary,
(Commercial Department),
Board of Trade.

APPENDIX A.

EXTRACT FROM GAMBIA GOVERNMENT GAZETTE.

RETURN of Principal Articles of Imports, 1907–1911.

Articles and Countries.	Quantity.					Value.				
	1907.	1908.	1909.	1910.	1911.	1907.	1908.	1909.	1910.	1911.
Cotton Goods—	pkgs.	pkgs.	pkgs.	pkgs.	pkgs.	£	£	£	£	£
Great Britain ...	2,937	2,494	3,467	4,958	4,287	72,939	57,262	74,409	114,781	105,540
Sierra Leone ...	28	35	10	13	—	69	53	20	18	—
France	413	592	220	743	1,171	7,746	9,661	2,749	11,263	18,527
Germany ...	51	49	84	221	334	1,026	834	1,516	4,057	5,790
Belgium	—	9	—	—	—	—	93	—	—	—
French Colonies	19	73	29	3	—	236	941	227	17	—
Portuguese „	1	3	5	—	—	7	21	65	—	—
Spanish „	—	—	—	—	17	—	—	—	—	238
Holland	—	1	—	4	5	—	6	—	119	77
Morocco	—	—	3	26	12	—	—	42	356	152
Total	3,449	3,256	3,818	5,968	5,826	82,023	68,871	79,028	130,611	130,324
Tobacco—	lbs.	lbs.	lbs.	lbs.	lbs.					
Great Britain ...	206,983	114,516	80,887	15,897	32,746	5,878	3,709	2,905	778	1,350
Sierra Leone ...	—	—	2	—	—	—	—	1	—	—
France	60,667	940	107,031	49,776	14,420	1,663	83	2,996	1,446	522
Germany ...	1,473	59,621	560	36,230	45,384	69	1,801	70	1,570	1,433
America	25,257	10,146	194,248	237,921	160,684	613	333	5,795	3,133	4,937
French Colonies	234	9	20,706	10	—	11	3	610	4	—
Portuguese „	50	28	128	92	—	14	8	40	27	—
Spanish „	—	—	—	—	26	—	—	—	—	8
Holland	—	—	158	—	—	—	—	16	—	—
Switzerland ...	—	—	—	50	—	—	—	—	6	—
Total	294,664	185,260	403,720	339,976	253,260	8,248	5,937	12,433	6,964	8,250
Kola Nuts—	lbs.	lbs.	lbs.	lbs.	lbs.					
Sierra Leone ...	1,015,474	905,045	798,578	1,112,565	1,287,290	39,942	39,724	45,339	65,534	72,598
Spirits—	galls.	galls.	galls.	galls.	galls.					
Great Britain ...	6,892	4,753	5,195	3,164	4,247	1,576	1,215	1,410	1,223	1,637
Sierra Leone ...	2	—	—	—	—	1	—	—	—	—
France	1,523	2,700	2,820	4,469	4,648	630	812	862	1,326	1,245
Germany ...	15,156	11,965	17,148	34,351	48,970	2,398	1,900	2,053	3,766	5,119
Holland	1,302	7,606	6,598	5,783	2,285	212	1,267	809	731	236
America	229	213	3,721	739	2,625	17	17	454	83	276
French Colonies	71	97	2	—	—	38	36	2	—	—
Total	25,175	27,334	35,484	48,506	62,775	4,872	5,247	5,590	7,129	8,513
Wine—	galls.	galls.	galls.	galls.	galls.					
Great Britain ...	1,691	2,686	1,032	2,178	1,138	401	459	328	504	452
France	14,097	14,147	17,398	16,906	22,447	1,513	1,278	1,738	1,851	2,761
Germany ...	123	101	231	72	94	30	21	39	21	36
French Colonies	2,555	3,115	—	1,727	—	199	233	—	116	—
Portuguese „	48	16	62	198	4	13	11	9	35	4
Holland	—	—	—	—	20	—	—	—	—	14
Total	18,514	20,065	18,723	21,081	23,703	2,156	2,002	2,114	2,527	3,267

GAMBIA—*cont.*

APPENDIX A.—*cont.*

Articles and Countries.	Quantity					Value.				
	1907.	1908.	1909.	1910.	1911.	1907.	1908.	1909.	1910.	1911.
Sugar—	cwts.	cwts.	cwts.	cwts.	cwts.	£	£	£	£	£
Great Britain ...	659	253	602	632	986	700	286	677	787	1,143
France	4,388	5,025	5,503	7,883	10,722	3,850	4,354	5,013	8,682	11,120
Germany ...	128	170	150	232	364	96	158	148	239	348
French Colonies	1	44	—	—	—	1	40	—	—	—
Holland	5	—	—	—	—	8	—	—	—	—
Total	5,181	5,492	6,255	8,747	12,072	4,655	4,838	5,838	9,708	12,611
Gunpowder—	brls.	brls.	brls.	brls.	brls.					
Great Britain ...	235	242	212	395	199	501	608	512	739	462
France	—	17	—	—	—	—	40	—	—	—
Germany ...	—	—	50	9	—	—	—	92	18	—
French Colonies	1	—	—	—	—	1	—	—	—	—
Total	236	259	262	404	199	502	648	604	757	462
Salt—	tons.	tons.	tons.	tons.	tons.					
France	—	—	—	—	1	—	—	—	—	2
Portuguese Colonies.	2,622	1,526	2,326	1,420	1,546	2,211	1,250	1,954	1,642	1,545
Germany ...	—	101	—	—	—	—	128	—	—	—
Spanish Colonies	—	—	—	—	3	—	—	—	—	6
Total	2,622	1,627	2,326	1,420	1,550	2,211	1,378	1,954	1,642	1,553
Rice—	cwts.	cwts.	cwts.	cwts.	cwts.					
Great Britain ...	61,718	28,141	16,599	27,686	36,161	32,899	12,890	8,242	13,969	18,790
Sierra Leone ...	127	204	269	147	162	76	105	132	80	100
France	35,435	35,739	32,270	49,956	22,827	17,233	17,668	14,002	21,802	10,584
Germany ...	41,695	14,311	19,311	23,304	60,515	20,304	7,101	9,340	10,235	29,726
French Colonies	1	—	—	6	—	1	—	—	1	—
Portuguese „	10	—	—	—	—	6	—	—	—	—
Holland	2,894	—	—	—	6,178	1,370	—	—	—	3,259
Total	141,880	78,395	68,449	101,099	125,843	71,889	37,764	31,716	46,087	62,459

APPENDIX B.

RETURN of Articles the Importation of which from Great Britain has during the past 12 years decreased in proportion of total importation.

Articles.	Proportions obtained from Great Britain of the total Importations.	
	1899.	1911.
Flour	60 per cent.	18 per cent.
Cotton Goods	92 „	80 „
Woollen Goods	66 „	50 „
Cutlery	90 „	44 „
Machinery	83 „	54 „
Boots and Shoes	66 „	50 „
Candles	95 „	50 „
Umbrellas	66 „	33 „
Beads	50 „	6 „
Apparel, Wearing	75 „	50 „

STRAITS SETTLEMENTS.

Import and Export Office,
Singapore.
9th September, 1912.

SIR,

IN reply to your letter of the 6th June, I now have pleasure in forwarding you a Report on British and Foreign competition in the Straits Settlements on the lines set forth therein.

I have, &c.,
A. STUART,
Registrar of Imports and Exports.

The Assistant Secretary,
(Commercial Department),
Board of Trade.

British and Foreign Trade in the Straits Settlements.

In submitting a report on the principal articles of trade where the values of foreign imports into this Colony exceed those of British origin it seems necessary to give some preliminary explanation.

The Colony imports goods not only for local consumption amongst a population which, including Labuan and Christmas and Cocos Islands, numbers about 715,000, as well as for the requirements of shipping, but the ports of Singapore and Penang are distributing depôts collecting agricultural and mineral produce from surrounding places which is sent chiefly to Europe and America, and distributing the manufactures of western countries throughout the numerous places of South-east Asia.

The ports being free no customs exist, and considering the large number of Chinese and Native traders, the trade returns cannot claim the same full and accurate statistics which Colonies with custom houses and a large European population are in a position to provide.

Thus, it is probable that a certain amount of goods of American and Continental origin are credited to the United Kingdom, being shipped from British ports, and as the first known port of shipment is taken as indicating the country of origin, goods shipped at Antwerp are sometimes of German and Dutch manufacture, while Switzerland having no place in the returns, the goods of that country are credited generally to France or Italy.

The tendency to ship goods through London by Continental merchants has been a dwindling one since these were required to be marked with the country of origin, and the great increase in the means of direct communication having also helped to discourage indirect shipments, I do not think this is now a serious factor.

The imports from the United States shipped from home ports and declared here as from Liverpool and London are few and not of much account, and would not detract from the deductions on the broad results.

Some of the classes of manufactured goods given in the trade returns are very comprehensive, and although the whole may show preponderating British or Foreign values, I have, where necessary, commented in the Appendix on the more important items that are included in the class, especially in hardware and cutlery, and apparel, hosiery, millinery, haberdashery and drapery.

Another point is the overlapping that must take place where an article may quite correctly be described under two or even more classes, according to the purpose for which it is to be used. This I have endeavoured to meet by showing the totals of two or more kindred classes where such is likely to occur, or commenting on the matter in more detail.

A. *Raw Materials.*—The raw materials including gums, spices, sago, tapioca, tin and tin ore, canes, shells and produce generally are collected and shipped without being locally consumed to any extent, except in one or two cases, and may therefore more properly be treated as exports which lie outside the scope of this report.

The class represented in value in 1911 over 46 per cent. of the total imports.

Included in it are coal, linseed oil, turpentine, pig iron, pig lead, and copper slabs, in each of which British values predominate.

Lubricating oil, liquid fuel, benzine and petroleum are now mostly the products of the United States, Sumatra and Dutch Borneo.

B. *Foods, Drinks, Live Animals and Narcotics.*—The class live animals, foodstuffs, drinks and narcotics excluding spices, tapioca, and sago, valued £15¼ millions in 1911 or over 34 per cent. of the total imports of which roughly not more than 5 per cent. or 6 per cent. is European.

Over 70 per cent. of these total imports were re-exported. Approximately, the United Kingdom furnishes 4 per cent. of the class, British Possessions over 40 per cent., and the balance is foreign.

In all cases, except the few articles she is known to produce, I have taken the Colony of Hongkong, which is a mere distributor of Chinese and Japanese goods, as a foreign country, as the enormous imports from that place increase British Possessions' percentage by about 10.

Imports of *Asiatic produce* included in (B) in which British values chiefly representing India and Australia exceed the foreign, are :—Horses, sheep and goats, currystuffs, isinglass, sharks' fins, ghee, crushed cattle food, dhall, gram and other grains, wheat flour, opium, sago, corriander seeds, bran, and onions and garlic, and of *European produce* imported chiefly from the United Kingdom and Australia are :—Biscuits, butter, confectionery, drugs and medicines, fresh fruits, whisky, porter and stout, provisions tinned and bottled and fresh and salted, excluding milk, hams and bacons, fresh meat, cigarettes and tobacco.

Asiatic foreign import values exceed British in cattle, swine, bêche-de-mer, birds' nests, chocolate, medicines, fish, dry and salted and fresh, dried fruits, beans and peas, rice husked and unhusked, lard, native liquor, provisions dry salted and in jars, cigars, raw sago, salt, sugar, tea, tobacco, vegetables, and mineral waters, and *European and American values of goods* exceed British in milk, spirits, except whisky and wines, and beer excluding porter and stout.

In treating of these articles of Asiatic origin in which the largest imports are from foreign countries, it will, I think, be sufficient to show the total values for the three years and the value of British imports, and indicate in order the principal sources of supply (*see* Table I.).

TABLE I.

STATEMENT showing *in thousands* the QUANTITIES where stated and VALUES in POUNDS STERLING of LIVE ANIMALS, ARTICLES of FOOD, DRINKS and NARCOTICS where FOREIGN IMPORTS exceed those from BRITISH SOURCES.

(Hongkong treated as a foreign country.)

Articles.	Year.	Unit of Quantity.	Total.		United Kingdom and British Possessions.		Other Principal Sources of Supply in order of importance.
			Quantities and values in thousands.		Quantities and values in thousands.		
			Quantities.	£	Quantities.	£	
Cattle	1909	No.	26	133	6	44	Siam.
	1910	„	35	189	11	65	
	1911	„	30	185	12	85	
Swine	1909	No.	82	166	3	6	Dutch Indies, Siam, French Indo-China and China.
	1910	„	100	205	3	6	
	1911	„	109	231	3	7	
Bêche-de-mer	1909	Cwts.	6	15	1	3	Dutch Indies, Philippines and Sulu.
	1910	„	6	15	1	3	
	1911	„	7	20	1	3	
Birds' nests	1909		—	71	—	13	Dutch Indies.
	1910		—	56	—	7	
	1911		—	64	—	9	
Chocolate and cocoa ...	1909	Cwts.	10	31	2	7	Dutch Indies.
	1910	„	15	40	2	7	
	1911	„	8	26	2	5	
Drugs and medicines...	1909		—	236	—	33	Hongkong and China.
	1910		—	252	—	38	
	1911		—	305	—	46	

	1909.	1910.	1911.
	1,000 £'s		
United Kingdom ...	26	30	35
Continent	3·5	3	4
United States ...	3	3	3·5

STRAITS SETTLEMENTS—*continued.*

TABLE I.—*continued.*

Articles.	Year.	Unit of Quantity.	Total. Quantities and values in thousands.		United Kingdom and British Possessions. Quantities and values in thousands.		Other Principal Sources of Supply in order of importance.
			Quantities.	£	Quantities.	£	
Fish, dry and salted ...	1909	Cwts.	1,164	1,029	210	138	Siam, French Indo-China, Dutch Indies, and Hongkong and China.
	1910	,,	1,229	1,114	204	141	
	1911	,,	1,283	1,169	223	162	
Fish, fresh	1909		—	30	—	4	Dutch Indies.
	1910		—	34	—	17	
	1911		—	40	—	19	
Fruits	1909		—	138	—	41	Hongkong and China.
	1910		—	173	—	58	
	1911		—	194	—	52	
Beans and peas ...	1909	Cwts.	519	201	45	20	Hongkong and China.
	1910	,,	509	226	73	33	
	1911	,,	453	206	79	34	
Rice, husked and unhusked.	1909	Cwts.	12,699	4,614	4,024	1,384	Siam and French Indo-China.
	1910	,,	13,055	4,623	6,157	2,045	
	1911	,,	13,088	5,760	7,464	3,015	
Native liquor	1909	Gallons	306	45	—	—	Hongkong and China, Java.
	1910	,,	632	101	—	—	
	1911	,,	592	93	—	—	
Spirits (excluding whisky and native liquor).	1909	Gallons	595	167	13	12	Brandy from France, gin from Holland.
	1910	,,	491	245	41	22	
	1911	,,	417	172	48	28	
Wines	1909	Gallons	66	32	7	12	France and Continent of Europe.
	1910	,,	76	46	24	15	
	1911	,,	68	41	26	15	
Beer and ale (excluding porter and stout).	1909	Gallons	592	85	111	22	Germany and other Continental countries, Japan.
	1910	,,	712	103	264	27	
	1911	,,	776	120	294	34	
Milk, Condensed and Sterilized.	1909	Cases	235	218	4	4	Italy, including Switzerland, Germany, Holland, Norway.
	1910	,,	257	240	19	12	
	1911	,,	283	264	33	21	

Provisions, dry and salted, and in tins, bottles and jars, (excluding biscuits, milk and butter).							1,000 £'s. United Kingdom.	United States.	Germany.	Belgium.	Other Continental Countries.
	1909		—	361	—	73	56	16	12	7	14
	1910		—	434	—	85	63	22	12	9	22
	1911		—	479	—	96	71	18	18	9	19
							Hongkong and China principal sources of supply.				
Mineral waters ...	1909		—	5	—	—	Japan and the Continent.				
	1910		—	6	—	1					
	1911		—	10	—	2					
Salt	1909	Cwts.	1,317	58	56	3	Egypt, Arabia, India and Siam.				
	1910	,,	799	38	106	5					
	1911	,,	1,082	52	100	5					
Sugar	1909	Cwts.	1,262	772	150	60	Java (Hongkong here included in British Possessions).				
	1910	,,	1,202	774	176	89					
	1911	,,	1,289	831	95	47					
Tea	1909	Cwts.	64	189	5	29	China and Hongkong, Japan.				
	1910	,,	64	194	7	35					
	1911	,,	82	249	8	40					
Tobacco	1909	Cwts.	138	529	16	88	China and Hongkong, Java and Sumatra.				
	1910	,,	140	550	21	109					
	1911	,,	144	553	18	101					
Vegetables	1909		—	174	—	24	Java and China.				
	1910		—	179	—	22					
	1911		—	223	—	30					
Bran	1909	Cwts.	1,156	208	494	86	Siam, French Indo-China.				
	1910	,,	1,067	181	475	79					
	1911	,,	1,293	247	691	125					
Wheat flour ...	1909	Cwts.	640	380	140	85	Hongkong and United States. A portion of the Hongkong supplies not here included in British Possessions, estimated in 1911 at 8,000 cwts., was from Australia, the balance from America.				
	1910	,,	558	321	225	129					
	1911	,,	713	392	403	209					
Lard	1909	Cwts.	69	124	—	—	Hongkong and China, French Indo-China and small imports from United States of America.				
	1910	,,	69	131	—	—					
	1911	,,	82	172	—	—					

STRAITS SETTLEMENTS—*continued.*

C. *Manufactured and Partly Manufactured Goods.*—It may be interesting to show the value in thousands of pounds sterling of imports of *all classes of goods* from Europe and America, excluding only the raw materials, coal and petroleum, in 1891, 1901, 1911, and also in 1909 and 1910.

Almost without exception goods from Europe and America have undergone some process of manufacture however slight, though classed as foodstuffs and drinks, &c., in the trade returns here.

	1891.	1901.	1909.	1910.	1911.
	1,000 £'s.				
From United Kingdom	2,387	2,839	3,657	4,469	4,654
„ Continent of Europe	965	1,562	1,543	1,887	2,010
„ United States	12	92	317	399	359
United Kingdom excess over Continental and United States imports.	1,410	1,185	1,797	2,183	2,285

The Continental countries detailed show as follows in thousands of pounds sterling for the last three years :—

	1909.	1910.	1911.
	1,000 £'s.		
Austria-Hungary	133	154	181
Belgium	187	279	285
Denmark	12	9	30
France	186	224	223
Germany	523	632	718
Italy	252	310	317
Netherlands...	223	241	225
Russia	3	7	3
Spain	10	11	10
Sweden	13	17	10
Norway	1	3	7

The goods imported classed as manufactured and partly manufactured (excluding all foodstuffs, liquors and raw materials) valued £6,718,000 in 1909, £8,157,000 in 1910, and in 1911 £8,623,000 or about 20 per cent. of the total imports in that year.

The following shows the approximate totals of the class according to sources of supply :—

	1909.		1910.		1911.	
	1,000 £'s.					
	£	Per cent.	£	Per cent.	£	Per cent.
From United Kingdom	3,133	or 46·6	3,769	or 46·2	3,890	or 45·1
„ British Possessions excluding Hongkong.	822	or 12·2	963	or 11·8	1,055	or 12·2
Total British	3,955	or 58·8	4,732	or 58	4,945	or 57·3
„ Foreign Countries including Hongkong.	2,763	or 41·1	3,425	or 42	3,678	or 42·7
British excess	1,192	or 17·7	1,307	or 16	1,267	or 14·6

It is to be kept in view that under Foreign Countries and British Possessions come articles, some of them of purely and others largely of Asiatic origin.

British import values of goods predominate in the following articles :—

Textiles.—Canvas, cotton piece goods, yarns, sewing thread, cotton handkerchiefs, coir rope, manilla rope, jute gunnies, hats and caps, silk thread, woollen cloth, woollen blankets, twine, unenumerated textiles.

STRAITS SETTLEMENTS—*continued.*

Metals :—Arms, electrical machinery, engines, boilers and parts, other machinery unenumerated, sewing machines, anchors and chains, brassware, cycles, motor cars and accessories, iron bar and nail rod, corrugated iron, ironware, sheet lead, leadware, steel manufactures, tin plates, tinware, tools, instruments and implements, wire rope, yellow metal sheathing, zincware, manufactured metals unenumerated, gas materials, telegraph and telephone materials, tramway and railway materials.

Miscellaneous :—Detonators and fuse, dynamite, gunpowder, books and maps, bricks and tiles, candles, cement, chemicals, coke, toys, games and fancy goods, glass bottles, boots and shoes, saddlery, oilman's sundries, paints, photographic materials, soap and soda, stationery and tar.

Foreign import values predominate in the following articles chiefly for the reasons given, but for particulars, *see* Appendix :—

Hosiery and haberdashery with small wares (lower prices, greater adaptation, want of enterprise or effort), towels (lower prices), cotton blankets (lower prices, greater adaptation), woollens of sorts, excluding woollen cloth (greater adaptation), cooking utensils (lower prices, greater adaptation), hardware (lower prices, greater adaptation), hoop iron (lower prices), wire nails (want of enterprise or effort), zinc sheathing (lower prices and want of effort), beads (want of enterprise or effort), cabinetware and woodenware (greater adaptation), clocks and watches (lower prices), earthenware and crockery (lower prices), glass and glassware, excluding bottles (lower prices), india-rubber goods (lower prices), synthetic indigo and aniline dyes (want of enterprise or effort), lamps and lampware (lower prices, greater adaptation), musical instruments (lower prices, want of enterprise or effort), paper (lower prices, greater adaptation), perfumery (lower prices, greater adaptation), roofing and building materials (want of enterprise or effort), cinematograph materials (want of enterprise or effort), and the Asiatic predominating foreign articles—silk piece goods, umbrellas, copperware, bamboo and rattanware, jinrickshas, Japanware, fireworks, joss sticks and joss paper, matches, mats and mattings, these being more adapted to local requirements.

TABLE II.

STATEMENT showing *in thousands* the QUANTITIES where stated and VALUES in thousands of pounds sterling of MANUFACTURED and PARTLY MANUFACTURED ARTICLES in which FOREIGN IMPORTS exceed those from BRITISH SOURCES.

—	Year.	Unit of Quantity.	Total Imports.		United Kingdom.		British Possessions.		Germany.		Belgium.		Italy.		Holland.		Austria.		France.		United States of America.		Hongkong and China.		Japan.		Egypt.	
			Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£
1. Apparel, hosiery, millinery and drapery goods.	1909		—	354	—	124	—	8	—	125	—	4	—	4	—	2	—	10	—	1	—	—	—	36	—	37	—	—
	1910		—	436	—	172	—	12	—	149	—	6	—	12	—	3	—	8	—	2	—	—	—	33	—	37	—	—
	1911		—	503	—	183	—	16	—	171	—	7	—	10	—	3	—	16	—	1	—	—	—	35	—	50	—	—
2. Towels and napery	1909		—	26	—	3	—	·5	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	21	—	—
	1910		—	25	—	3	—	·5	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	·5	—	20	—	—
	1911		—	31	—	3	—	·7	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	26	—	—
3. Cotton blankets ...	1909	Pieces	343	21	168	6	—	—	35	3	4	·4	—	—	119	8	—	—	—	—	—	—	4	1	9	1	—	—
	1910	„	243	19	37	2	—	—	55	5	5	·6	—	—	136	9	4	·2	—	—	—	—	—	—	—	—	—	—
	1911	„	209	17	50	2	—	—	54	6	13	1	—	—	80	5	4	·2	—	—	—	—	3	1	2	·4	—	—
4. Cooking utensils ...	1909		—	32	—	3	—	—	—	3	—	5	—	—	—	3	—	6	—	1	—	—	—	10	—	—	—	—
	1910		—	44	—	5	—	—	—	5	—	6	—	—	—	3	—	4	—	1·5	—	—	—	18	—	—	—	—
	1911		—	61	—	5	—	—	—	7	—	7	—	—	—	3	—	7	—	1·5	—	—	—	30	—	—	—	—
5 Hardware	1909		—	103	—	37	—	·6	—	30	—	5	—	—	—	7	—	16	—	—	—	2	—	2·	—	2	—	—
	1910		—	177	—	54	—	1	—	63	—	12	—	—	—	12	—	24	—	—	—	4	—	2	—	2	—	—
	1911		—	182	—	54	—	1·5	—	61	—	19	—	—	—	12	—	25	—	—	—	4	—	—	—	2	—	—
6. Iron hoop	1909	Cwts.	2	1	—	—	—	—	—	—	2	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	1910	„	5	5	·4	·3	—	—	—	—	4·5	3	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	1911	„	4	3	·7	·5	—	—	·4	·2	3	2	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
7. Wire nails	1909	Cwts.	64	34	4	2	—	—	28	15	20	11	—	—	—	—	3	2	—	—	7	4	—	—	—	—	—	—
	1910	„	65	35	7	4	—	—	25	13	21	12	—	—	—	—	4	2	—	—	8	4	—	—	—	—	—	—
	1911	„	71	36	2	1	—	—	42	21	16	9	—	—	—	—	1	·5	—	—	9	5	—	—	—	—	—	—
8. Zinc sheathing ...	1909	Cwts.	7	10	·8	1	—	—	·4	·7	5	8	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	1910	„	6	9	·4	·7	—	—	—	—	6	9	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	1911	„	6	9	1·5	2	—	—	—	—	4·5	7	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
9. Beads	1909		—	8	—	—	—	2	—	2	—	—	—	1	—	—	—	—	—	—	—	—	—	—	—	—	—	1
	1910		—	10	—	—	—	4	—	3	—	—	—	1	—	—	—	1	—	—	—	—	—	—	—	—	—	·5
	1911		—	5	—	—	—	2	—	1	—	—	—	1	—	—	—	1	—	—	—	—	—	—	—	—	—	—
10. Cabinetware and woodenware	1909		—	70	—	13	—	4	—	6	—	·8	—	—	—	·2	—	6	—	·5	—	·9	—	14	—	14	—	—
	1910		—	88	—	18	—	6	—	7	—	·6	—	—	—	1	—	17	—	—	—	2	—	17	—	13	—	—
	1911		—	103	—	27	—	6	—	10	—	1	—	—	—	3	—	16	—	·5	—	1·5	—	18	—	14	—	—

11. Clocks and watches	1909		—	22	—	2	—	—	—	1	—	—	—	5	—	—	—	·5	—	6	—	1	—	1	—	4	—	—
	1910		—	33	—	4	—	—	—	1	—	—	—	7	—	—	—	—	—	10	—	1	—	1	—	8	—	—
	1911		—	38	—	4	—	—	—	1	—	—	—	6	—	1·5	—	·5	—	12	—	1·5	—	3	—	8	—	—
12. Earthenware and crockery (excluding bricks and tiles).	1909		—	126	—	15	—	1	—	6	—	6	—	—	—	11	—	·7	—	—	—	—	—	77	—	8	—	—
	1910		—	150	—	18	—	6	—	15	—	13	—	—	—	5	—	—	—	—	—	—	—	81	—	10	—	—
	1911		—	205	—	27	—	2	—	22	—	24	—	—	—	5	—	4	—	—	—	—	—	106	—	13	—	—
13. Glassware and glass bottles.*	1909		—	84	—	12	—	—	—	17	—	12	—	—	—	2·5	—	1	—	—	—	—	—	1	—	19	—	—
	1910		—	123	—	19	—	—	—	18	—	31	—	—	—	11	—	2	—	—	—	—	—	1	—	27	—	—
	1911		—	112	—	27	—	—	—	15	—	17	—	—	—	2	—	3	—	—	—	—	—	2	—	28	—	—
14. India-rubber goods	1909		—	10	—	5	—	1	—	3	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	1910		—	18	—	9	—	—	—	6	—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—
	1911		—	56	—	20	—	·5	—	18	—	—	—	—	—	—	—	—	—	3	—	—	—	—	—	10	—	—
15. Lamps and lampware.	1909		—	40	—	12	—	—	—	21	—	—	—	—	—	—	—	—	—	—	—	1	—	2	—	·3	—	—
	1910		—	61	—	18	—	—	—	36	—	1	—	—	—	—	—	—	—	—	—	1	—	2	—	1	—	—
	1911		—	65	—	25	—	—	—	33	—	·7	—	—	—	—	—	—	—	—	—	1·4	—	2	—	·8	—	—
16. Leatherware, excluding boots and shoes and saddlery.	1909		—	32	—	10	—	4	—	10	—	4	—	—	—	—	—	—	—	—	—	·4	—	2	—	·7	—	—
	1910		—	59	—	17	—	11	—	16	—	5	—	—	—	—	—	—	—	·5	—	1	—	4	—	3	—	—
	1911		—	67	—	17	—	12	—	17	—	5	—	—	—	—	—	—	—	2	—	·5	—	7	—	5	—	—
17. Musical instruments	1909		—	25	—	6	—	—	—	10	—	—	—	—	—	—	—	2	—	—	—	1	—	4	—	—	—	—
	1910		—	33	—	11	—	1	—	6	—	—	—	—	—	—	—	7	—	—	—	·3	—	6	—	—	—	—
	1911		—	41	—	14	—	4	—	10	—	—	—	—	—	—	—	7	—	—	—	—	—	3	—	—	—	—
18. Perfumery and cosmetic.	1909		—	70	—	14	—	2	—	·5	—	9	—	—	—	1	—	—	—	13	—	2	—	5	—	17	—	—
	1910		—	78	—	15	—	2	—	5	—	10	—	—	—	1·5	—	—	—	11	—	5	—	9	—	19	—	—
	1911		—	82	—	19	—	1	—	8	—	10	—	—	—	2	—	—	—	14	—	5	—	6	—	16	—	—
19. Paper and paperware.	1909		—	177	—	54	—	1·5	—	6	—	2	—	—	—	—	—	39	—	—	—	·5	—	71	—	1	—	—
	1910		—	199	—	58	—	·7	—	8	—	5	—	—	—	—	—	46	—	—	—	1·5	—	76	—	1·5	—	—
	1911		—	200	—	42	—	2	—	7	—	11	—	—	—	1	—	47	—	—	—	1·6	—	86	—	2	—	—
20. Roofing and building materials unenumerated.	1909		—	8	—	3	—	1	—	·3	—	—	—	—	—	—	—	1	—	—	—	1	—	—	—	—	—	—
	1910		—	5	—	·9	—	—	—	1	—	—	—	—	—	—	—	·5	—	—	—	1·7	—	·5	—	—	—	—
	1911		—	11	—	3	—	1·5	—	—	—	—	—	—	—	—	—	—	—	—	—	4	—	—	—	—	—	—

* Locally returned empty bottles increase the totals.

TABLE II.—*continued.*

Principally Asiatic Products.

—	Year.	Unit of Quantity.	Total Imports.		United Kingdom.		British Possessions.		Sweden.		France.		Other Continental Countries.		United States of America.		Hongkong and China.		Japan.		Dutch Indies.		Siam.		French Indo-China.	
			Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£	Quantities.	£
21. Umbrellas	1909		—	51	—	4	—	—	—	—	—	8	—	—	—	—	—	14	—	25	—	—	—	—	—	—
	1910		—	63	—	10	—	—	—	—	—	6	—	—	—	—	—	15	—	32	—	—	—	—	—	—
	1911		—	58	—	13	—	—	—	—	—	3	—	—	—	—	—	19	—	23	—	—	—	—	—	—
22. Silk piece goods	1909	Pieces	236	263	6	12	1	1	—	—	3	4	2	6	—	—	174	196	23	24	—	—	24	17	—	—
	1910	,,	366	385	4	10	5	4	—	—	3	5	3	7	—	—	267	282	45	44	—	—	36	30	—	—
	1911	,,	436	428	1·7	3·5	4	3	—	—	2·5	4	3	7	—	—	281	292	90	66	—	—	52	49	—	—
23. Copperware	1909		—	16	—	4	—	3	—	—	—	—	—	—	—	—	—	6	—	—	—	1	—	—	—	—
	1910		—	21	—	3	—	2	—	—	—	—	—	—	—	—	—	11	—	—	—	4	—	—	—	—
	1911		—	25	—	4	—	3	—	—	—	—	—	—	—	—	—	12	—	—	—	5	—	—	—	—
24. Carriages and carriage materials, including Jinrickshas and parts.	1909		—	44	—	8	—	·9	—	—	—	—	—	—	—	·2	—	—	—	34	—	—	—	—	—	—
	1910		—	69	—	7	—	·7	—	—	—	—	—	—	—	1·5	—	—	—	59	—	—	—	—	—	—
	1911		—	58	—	5	—	1	—	—	—	—	—	—	—	1	—	—	—	50	—	—	—	—	—	—
25. Bamboo and rattanware...	1909		—	28	—	—	—	—	—	—	—	—	—	—	—	—	—	26	—	—	—	—	—	—	—	—
	1910		—	30	—	—	—	—	—	—	—	—	—	—	—	—	—	28	—	—	—	—	—	—	—	—
	1911		—	33	—	—	—	1	—	—	—	—	—	—	—	—	—	28	—	·8	—	1·5	—	—	—	—
26. Japanware, unenumerated	1909		—	18	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	18	—	—	—	—	—	—
	1910		—	24	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	24	—	—	—	—	—	—
	1911		—	28	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	28	—	—	—	—	—	—
27. Joss sticks and joss paper	1909		—	103	—	—	—	—	—	—	—	—	—	—	—	—	—	103	—	—	—	—	—	—	—	—
	1910		—	103	—	—	—	—	—	—	—	—	—	—	—	—	—	103	—	—	—	—	—	—	—	—
	1911		—	138	—	—	—	—	—	—	—	—	—	—	—	—	—	138	—	—	—	—	—	—	—	—
28. Matches	1909	Cases	83	181	—	—	—	—	2	5	—	—	—	—	—	—	2	7	78	166	—	—	—	—	—	—
	1910	,,	88	185	—	—	—	—	4·5	11	—	—	—	—	—	—	1	3	82	170	—	—	—	—	—	—
	1911	,,	78	162	—	—	—	—	3	8	—	—	—	—	—	—	2	6	72	148	—	—	—	—	—	—
29. Mats and mattings ...	1909		—	63	—	—	—	3	—	—	—	—	—	—	—	—	—	21	—	3	—	31	—	—	—	4
	1910		—	67	—	2	—	4	—	—	—	—	—	—	—	—	—	20	—	4	—	33	—	—	—	5
	1911		—	74	—	·5	—	4	—	—	—	—	—	—	—	—	—	26	—	5	—	34	—	—	—	4
30. Fireworks	1909		—	65	—	—	—	—	—	—	—	—	—	—	—	—	—	64	—	—	—	—	—	—	—	—
	1910		—	76	—	—	—	—	—	—	—	—	—	—	—	—	—	75	—	—	—	—	—	—	—	—
	1911		—	89	—	·5	—	—	—	—	—	—	—	—	—	—	—	87	—	—	—	—	—	—	—	—

APPENDIX I.

(A.) GENERAL REMARKS.—It will generally be found that the Continental articles which compete in the markets of the United Kingdom with British, are the same class as meet with success in this market, only the qualities are, where possible, inferior to suit Eastern requirements and the pockets of the comparatively poorer populations of Asiatic countries.

In leading staples, foreign competition is not of much account, but in the numerous miscellaneous articles which are capable of novelty in design and finish, and where quality is not of the first consideration, the Continent especially leads.

Perhaps it is not to be expected of British manufacturers to produce a class of goods of such inferior makes as to endanger the commercial reputation of their leading productions, but it is this class, showy, attractive and cheap more than enduring, that meets native requirements. Even in the more prosperous ranks of the Chinese and native populations it is often considered foolish to purchase say expensive glassware, belts, crockery, or cooking utensils which are to be roughly handled and carelessly preserved, when there can be purchased several new, equally useful articles of the same kind, for the amount that would have to be paid for one.

Yet the tendency to buy a superior article is becoming obvious and some of the lowest grades are now left unnoticed, this being especially seen in body and neck wear.

Japanese productions, except in towels, glass and brushware, as well as caps and a few makes of singlets, all at prices unapproachable by European manufacturers, are not in favour, and sell only to the poorest classes to whom price is everything.

I have never heard it disputed that all classes of natives and Chinese much prefer British goods, and are even willing to pay a little more for these, but the Continent and Japan send goods to this market with English letterings and marks, the country of production being conspicuous by its absence, which frequently misleads the buyer though well known to the dealer who has purchased from the importing firms.

These dealers are anxious to have goods appear of British make, and the foreign manufacturers meet them as far as possible.

I am of opinion, and this is shared in by others who have knowledge and experience in the market, that all goods which are capable of being sold singly and which would not lose in utility or appearance should have on them in English the country of production whether British or foreign.

I was exceedingly surprised to find that there is still complaint at the conservative attitude adopted by many British manufacturers who decline to alter their designs, colourings and sizes at the request of importers here, stoutly maintaining that experience has shown the goods they have produced for so many years are the most suitable for the peoples of whose habits and tastes they know little.

The large British firms here with well established lines who are also exporters of produce, do not require to shew the same anxiety to provide new attractions for the bazaar as the small import firms, and I partly attribute the extension of Continental trade to the number of small importers, mostly foreign, but cannot say that foreign goods would be favoured by them if British goods equally attractive as regards design and price were available. In fact they must supply market demands, and they will go where the prices are lowest.

Some of the large British firms here look askance at Continental goods, and will not take these up if they can get British agencies, and, likewise, one or two of the larger foreign houses prefer to stock foreign goods. Japanese merchants, however, confine their custom to their own country's manufactures, and at intervals Japanese goods, hitherto not imported, are sent down to see how they will be received.

British manufacturers are not represented at all in certain goods, and some of these I will comment on later. In other cases they seem to make no effort to compete, sometimes because manufacturers will not at first make a stand and incur some loss in warding off a foreign article which has been cut down to secure the market, prices being gradually raised after the elimination of the British competition, but more generally the reason is they will not manufacture the low grades desired.

Credit is a question of some importance, and Continental firms are less strict in extending the periods of payment and delivery, resulting in heavy losses in times of stress. The larger British houses give from two to three months credit, while it is not uncommon for foreign firms to extend credits for much longer periods.

By nearly every mail foreign price lists, accompanied where possible by a wide range of samples, showing prices c.i.f., are received by firms here, so that importers can see at a glance the actual goods and cost laid down in Singapore—so great a convenience that it undoubtedly leads to trade.

The great commercial waterways of northern Europe no doubt facilitate and cheapen the export trade, placing the British manufacturers of the Midlands and places far removed from the principal seaports at a distinct disadvantage in competing for the export trade, especially in the heavier and more bulky classes of goods.

STRAITS SETTLEMENTS—*continued.*

(B.) DETAILED OBSERVATIONS.—The following comments refer to goods sold in the native market and not to those retailed in the large European stores and shops which are mainly British productions :—

1. *Apparel, Hosiery, Millinery, Drapery and Haberdashery* are classes of much importance, aggregating a value of over half a million pounds sterling.

German productions are largely singlets, socks, belts and numerous smallwares. The German singlet has always monopolised the market, except in the very cheapest description, which are Japanese. There is nothing to touch them in the quality and finish at a like price. In fact, the whole structure from beginning to end is attractive at a price averaging 9*s.* to 12*s.* a dozen. The British imports are for the restricted European market and are not seen in the bazaar, though some of this class finds its way into Penang for export, chiefly to Rangoon.

Japanese supplies, direct and through Hongkong, appeal only to the poorest class of native, but there has recently appeared quite a well-finished article which gives some promise of success.

Socks are chiefly German and cheaper than British, Japan cutting in with fancy designs at prices as low as 2*s.* 5*d.* a dozen.

There is, however, at present in this business a growing demand for cheap cashmere and thin woollen socks of British make.

Belts represent a large trade as every native and Chinese wear these, the tendency now being to import from the Continent the elastic webbing and buckles for local make up, and as the mother country has had the business in elastic belts and Germany in woven web there seems no apparent reason for this growing trade being lost to the United Kingdom since it has proved itself able to meet all competition in the finished article.

A movement is observable to use braces instead of belts, and these of fancy designs are coming from the Continent.

Another new demand by the Chinese is for collars, which are supplied from the United Kingdom, but Germany is moving to try for the trade at lower rates.

Buttons of acceptable fancy designs are low-priced German or Austrian ; metal, bone and linen for making up purposes being generally British. French pearl buttons are giving place to Japanese, who manufacture these from trocas shells.

Needles in cases are generally of British and German makes, but packets, of which there are enormous sales, are entirely from the Continent.

Drapery of a miscellaneous description is of British manufacture.

There is no trade to speak of in ready-made clothing outside Chinese coats and trousers *viâ* Hongkong, which is a dwindling import.

Although hats and caps form a class in the total of which British goods predominate in value, over 90 per cent. of the imports of soft felts are of Italian make, meeting with a little competition from Japan with descriptions in English. British manufacturers have largely lost the trade owing to the refusal to engage in cutting rates for a time.

Turkish Fez caps are from Austria. All other hats, including helmets, straws and caps, are from the United Kingdom, except pith sun topees, which are from Calcutta ; and Japan has captured the market in cheap imitation Panamas.

In all these articles enumerated above, price and get-up are the two factors, but principally price, that militate against British goods.

2. *Towels and Napery.*—This is a comparatively new class heading, formerly having been included under 1.

Japan monopolises the market in towels, producing these at one-third the price of European makes, and though the quality is poorer this is not so marked as to explain anything like the great difference in cost.

Napery is from the United Kingdom, being a special line appealing only to the richer classes.

3. *Cotton Blankets.*—The days of the old wick blankets, which were entirely British, have gone, and coloured articles chiefly of Dutch manufacture are in favour, selling at 18*s.* 8*d.* to 21*s.* per corge of 20 pieces, but it is probable that customs regulations in the once free port of Macassar and the Celebes have given a fillip to the Dutch article which can afford to sell cheaper here in consequence of the profitable trade done there.

English rugs or shawls with fringes are now coming into vogue, displacing blankets, and manufacturers should study this market.

4 and 5. *Hardware, Cooking Utensils, Tools, Instruments and Implements, Ironware, and Steel.*—Angles, tees, girders, iron rollers, joists, beams, stanchions, pillars and structural works, &c., are included under ironware or steel, and it is necessary to show, according to countries of supply, the European classes which are likely to overlap :—

Articles.	United Kingdom.	Germany.	Belgium.	Austria.	Netherlands.	France.	United States of America.
	1,000 £'s.						
	1909.						
Hardware	37	30	5	16	7	2	2
Cooking utensils	3	3	5	6	3	1	—
Tools, instruments and implements	28	4	4	—	4	—	3·5
Ironware	170	6	8	2	5	—	2
Steel	30	1	11	—	—	—	—

STRAITS SETTLEMENTS—*continued.*

Articles	United Kingdom.	Germany.	Belgium.	Austria.	Netherlands.	France.	United States of America.
	1,000 £'s.						
	1910.						
Hardware	54	63	12	24	12	—	4
Cooking utensils	5	5	6	4	3	1·5	—
Tools, instruments and implements	45	3·5	5	—	5	—	12
Ironware	233	10	18	4	8	—	12
Steel	59	3	15	—	—	—	—
	1911.						
Hardware	54	61	19	25	12	—	4
Cooking utensils	5	7	7	7	3	1·5	—
Tools, instruments and implements	46	3	4	—	4	—	9
Ironware	238	17	12	3	10	—	6
Steel	48	2	12	—	—	—	—
Totals—1909	268	44	33	24	19	3	7·5
1910	396	84·5	56	32	28	1·5	28
1911	391	90	54	35	29	1·5	19

Pocket knives are 90 per cent. German, fancy handled and easy opening designs finding favour.

Razors are also German, but the trade in this article is losing ground owing to the Chinese growing their hair in European fashion.

Tapping and pruning knives, saws, files and edge tools are fairly divided between British and Continental makes.

Scissors are brought from America in good finish and apparently fair material at from 3*s.* to 4*s.* 6*d.* a dozen, but hair clippers is a Continental trade and this is growing.

Shovels and changkol or hoe heads are British. In axe heads, however, American are preferred, being a superior article, and German makers imitate "Yankee" axe heads.

Brushware of the best is English, but Germany and Austria are most in evidence, though Japan is now ousting these, and more British are also coming in.

Padlocks of white iron and brass and the best brass locks are generally British. Imitation German brass locks with English lettering and marks such as "Royal Letters Patent, &c.," as well as cheap iron are largely sold, but the latter class of padlocks are losing ground, American coming in with much better qualities at lower than English prices.

Enamelware, much of which comes under cooking utensils, of the lightest descriptions are Austrian, German and Dutch, British productions being generally confined to heavy cooking pots with white enamel. The great trade is in saucepans, bowls, fry pans, dinner sets, jugs and basins, &c. of thin metal, bright coloured enamel, frequently flowered and chequered, which it is stated require poisonous chemicals in their preparation, against which there may be restrictions in the United Kingdom. The United Kingdom does not touch this class of trade.

Bail pots or saucepans with round wire handles of thin metal for native use is almost entirely foreign, comparing with the heavy cast-iron pots of Wolverhampton and West Bromwich unfavourably as regards quality but much cheaper. Probably British makers do not care to cater for the class.

Continental rice bowls—rough thin semi-circular cast-iron pans with two handles—cost sizes 2 to 5 inches, c.i.f., about £10 3*s.* 2*d.* per cask of 50 pieces, and 8 to 12 inches £7 3*s.* 5*d.* or 20 per cent. cheaper than English founders are prepared to quote.

Ironware. The heavy goods enumerated are nearly all British with a little from Belgium and Germany.

Under this head come bedsteads which are of Birmingham make exclusively, but, the Federation having just raised prices more than the increased cost of the raw material or increased wages seem to warrant, trial orders are now being given to Continental manufacturers.

Lawn mowers, weighing machines and copying presses are English or American, and galvanised buckets entirely British.

Barbed wire is cheaper from Belgium and Austria, and now America is making a bid for the trade, of which an important feature is packing, the bulkier reels being the better for native tastes.

Safes of Austrian make are pouring into the market. These are got up with fancy tops, single doors, straight bar handles, novel locks and wooden stands and are much cheaper though not so good as British safes. They are said to be both fire and burglar proof, but though the evidence of this is wanting, appearance carries all before it for native demands.

6. *Hoop Iron* is another Belgian article, the thin hoops for packing cases are quoted at home at £7 to £7 2*s.* per ton while British—a superior metal and of more substantial finish—was £8 5*s.* on same date. *Belgian bar iron* was quoted £5 15*s.* to £6 and Scotch bar £7 15*s.* to £8.

7. *Wire Nails.*—Although some wire nails are credited to the United Kingdom I am informed these are nearly all American. Belgian, German and Austrian wire nails sizes 0 to 7 costing 8*s.* to 8*s.* 3*d.* at the rate of 112 lbs. per keg are now losing ground before American nails of a distinctly superior quality though slightly dearer.

In these goods kegs have fallen to 60 lbs. weight in answer to unscrupulous demands. England has never entered the market, which was originally American.

8. *Zinc Sheathing* is entirely a Belgian trade, the cost of standard quality at time of writing being about £30 per ton.

9. *Beads.*—This with spangles and gold and silver thread is a fancy trade such as the Continent seems to defy competition in.

STRAITS SETTLEMENTS—*continued.*

10. *Cabinetware.*—There is a large business done locally in teak and hard woods, Shanghai carvers being employed, so that it is principally fittings and mirrors that describe the class, except in the case of Austria, which sends the well known bentwood furniture highly popular and largely selling among all classes.

Mirrors are principally from Holland and pictures and mouldings from Germany.

Ice chests and refrigerators are imported from America.

11. *Clocks and Watches.*—Clocks for offices and warehouses are either American, Japanese or German, while over 90 per cent. of the watches are Swiss, all at prices that cannot be touched by British makers.

12. *Earthenware and Crockery.*—The cheapest and roughest class of crockery comes from China (cups, saucers, bowls and plates), besides large quantities of bathing jars in blue enamel and fancy outer designs and earthen pots and jars at low prices.

European cups, saucers and plates are low-priced German, but plates from England are now being imported in larger quantities in response to the demand for slightly superior qualities.

A quarter of the total United Kingdom import values was earthenware drain pipes, &c., of which not much is received from the Continent.

13. *Glass and Glassware.*—Bottles for aërated waters and druggists, &c., are from the United Kingdom almost entirely, the value in 1911 reaching over £13,000, compared with a little over £1,000 value from the Continent, but Japan sends water bottles and decanters to the value of nearly £12,000.

Window glass is of Belgian make, also lamp chimneys, which represent a considerable business, while Germany sends cheap glass lamps, probably often declared as glassware. The Continental trade is being cut into by Japan, which sells goods comparing favourably with the cheapest German makes as low as 7*d.* a dozen for half-pint tumblers, and others in proportion.

The fancy class of vases and flower holders are mainly Austrian.

The same reason, viz., price, curtails sales of English glassware, which is bought only by the European and richest class of Chinese.

14. *India Rubber Goods* comprise not only tyres for cars, carriages and rickshas, but rubber soled shoes which sell largely here, and heel pads as well as toys, piping and rubber belting, &c.

There is a local factory producing all kinds of rubber goods and exporting some to Europe.

Some tyres, nearly all shoes, and toys are Continental, the great trade being in Austrian shoes of grey cloth and hard rubber soles, which however are going out in favour of white and grey canvas, soft and hard rubber soled shoes of British make.

Japan sends tyres for jinrickshas and also tyres for cycles and cars, manufactured there by a British company.

15. *Lamps and Lampware.*—The Continent, especially Germany, has always controlled the market in this class of goods. The prices are low and the designs fancy, while the quality of the better classes of hanging lamps with central draught are on the whole good. Brass hanging lamps, except those of one English maker, are nearly all German, and the prices much cheaper, but it is gratifying to see British manufacturers are now making a bold attempt to push brass and iron lamps of qualities a little better than the foreign and not much different in price.

Glass lamps are also German, sold at such prices as British manufacturers would not care to touch.

16. *Leatherware (excluding Boots and Shoes, Saddlery and Harness).*—While boots and shoes are entirely British, it appears strange that polished leather for uppers, imported on behalf of Chinese shoemakers, who do a large business, is entirely from the Continent, American efforts to compete not meeting with success, but Australian material is coming in. American hoods for carriages are on the increase.

17. *Musical Instruments and Accessories.*—This is a business where the United Kingdom import figures include Continental and American goods.

Except in pianos British manufacturers do not count.

The trade in gramophones and records—an enormous business—is done with German and American makers, while accordions, musical boxes and mouth organs are of Continental origin.

America also sends organs.

The United Kingdom has never done the trade, which even in the home market is, I believe, largely foreign.

18. *Perfumery and Cosmetics.*—The best class of perfumery and cosmetics is French and British, but the cheaper kinds are Continental and Japanese. Continued attention has to be paid to get up, and complaints are made that those engaged in the trade in the United Kingdom are slow to give effect to suggestions from this end, which they are compelled to do after they see they are not getting their proportionate share of the market—a very large one in this place.

19. *Paper and Paperware and Stationery.*—Paper and paperware is a class that in European imports is doubtless not always carefully discriminated from stationery.

The value of imports in both classes shows from Europe and America as follows :—

Years.	United Kingdom.	Germany.	Belgium.	Holland.	Austria.	France.	United States of America.
	1,000 £'s.						
1909	85	10	5	—	39	4	1·3
1910	97	11	5·3	—	47	4	2·5
1911	86	12	11	1·7	47	5	2·6

From China, coarse packing paper comes in large quantities, paper artificial flowers, &c.

English foolscap and writing paper and envelopes, as well as packing paper, rule the market, followed by cheap Austrian.

STRAITS SETTLEMENTS—*continued.*

This is a class of goods in which the very inferior qualities are not favoured.

Printing paper is largely Austrian in all but the best qualities, and strawboard Japanese, but English printing paper is becoming more largely used.

The cheapest pencils are Japanese, the best American, while Germany has the largest sales in this and paper bindings.

School stationery, including exercise books, pencils and slates, are practically all Austrian and German; ink, however, of a well-known British make is much preferred to the cheap Belgian imports.

The well printed office ledgers and journals are practically all British, as well as the best class of pocket-books, diaries, &c.

20. *Roofing and Building Materials.*—This is a comparatively new class, and several kinds of preparations of asbestos, sawdust, and other materials are used to prepare the various kinds that go under different fancy names; the trade seems to be on the increase.

REMARKS ON COMPETITION IN CERTAIN GOODS.

Motor Cars and Cycles.—Up to the end of 1911 the United Kingdom had much the largest share of the motor car business, but makers have apparently not made a special study of the requirements of the majority using cars, with the result that the United States is now sending cars of several makes, one especially (Ford), which is fast gaining favour owing to its cheapness and lightness, which means greater economy. A five-seated car of this sort is retailed at £195 8*s.* 6*d.*, and a three-seated at £175, the weight being only a little over one-half a British car of the same seating capacity weighing a ton and costing £400 and £350 respectively.

Replacements are easy in the case of American cars, a crank shaft for instance being got for £3, a British article costing three or four times more.

The American car is rougher and machined up only where required in the bearings, while the British car is largely hand done, heavy and substantial.

What is required here and in the Federated Malay States is a car of light structure, low priced, and parts easy to replace at reasonable cost.

Motor cycles are nearly all British, and ordinary cycles entirely so, no others being looked at.

Iron and Steel Goods of Heavy Material.—Regarding the trade in steel and iron of the heavier description there is exhibited a tendency to purchase from Belgium mild steel sections in larger quantities because these are cheaper and delivery has lately been quicker than from the United Kingdom, where the delay owing to the unsettled state of affairs between capital and labour has militated against despatch. It is found in constructional metal, however, which has to be worked up here, that Continental iron is more brittle and less easy to manipulate.

The difference in freights, if any, is now slight.

Photo and Cinematograph Materials.—The trade in photographic materials is British, except in inferior mounts sent from Germany which British manufacturers will not touch as the class of article would not be looked at in Europe.

Cheap rough cameras of Chinese make at less than a third European prices have been seen in the market, but do not promise any increase.

Cinematograph films, &c., are French only, no efforts apparently being made to do a British trade.

Cotton Goods.—Sarongs, slendangs, and kains are a large business, and it is alleged that in these and also in muslin prints British manufacturers will not pay sufficient attention to suggestions from this side.

There are classes of Dutch cambrics and black Italians that English manufacturers and dyers cannot touch, but Manchester goods more than hold their own over the whole class.

Chemicals.—While disinfectants are British, acids such as acetic used for rubber coagulation, sulphuric acid and acids for dyeing are from the Continent and Japan, Australia also coming in.

Rubber Cups.—There has sprung up a business in cups of metal, glass and porcelain for the collection of the latex of the Para rubber tree, and Japan is rapidly taking front rank in porcelain and glass cups, beautifully finished, without that roughness inside which characterises the same class of British porcelain, and in much superior packing, while the price is nearly 10 per cent. lower.

Woollens.—The United Kingdom keeps a hold on this trade but Germany leads in a class of cheap fancy tweeds of mixed materials or unions, and also sends a large quantity of Berlin wool, shawls, &c.

The finest cloths are English, chiefly Bradford and West of England.

The whole trade is expanding as the following figures, which include woollens and mixed goods (except blankets, which are entirely British), shew:—

Years.	United Kingdom.	Germany.	Other parts of the Continent.
	1,000 £'s.		
1909	17	12	4
1910	45	23	7
1911	53	31	13

BRITISH GUIANA.

CUSTOMS DEPARTMENT,
GEORGETOWN, DEMERARA.
9th August, 1912.

SIR,

I HAVE the honour to acknowledge receipt of your letter of the 6th June relative to the present position of British Trade in the Crown Colonies and Protectorates, and the means by which that trade may be developed in the future.

2. In the letter above mentioned you desired me to furnish you with certain information with regard to the trade of the Colony with a view to the vitalization of inter-empire trade.

3. I beg to enclose a statement (Appendix I) shewing the imports of the principal classes of articles imported into the Colony during the last three trade years, larger quantities of which are received from foreign sources than from British sources, together with the quantities received from each principal country of origin.

MANUFACTURES, OTHER THAN TEXTILES.

4. With regard to the list of manufactured goods contained in the attached statement, I beg to point out that it is not as complete as I would have liked, and for the following reason. There are numerous grades of articles, chiefly textiles, which are mainly secured from foreign sources, and which have no distinctive head in our statistical accounts, being classed under a comprehensive head such as "Linen, Cotton, and Woollen Goods," and consequently no data are available to shew the quantity or value of such goods imported from (*a*) British territory, and (*b*) foreign countries. I shall first deal with the manufactured articles in the list attached, and shall return to the question of textiles later. The manufactured articles in the list which are mainly obtained from non-British sources are as follows: blue, cement, matches, shooks, medicinal preparations (unofficial), motor cars, lamps and lanterns, paper and paper manufactures, machinery and wire for electric lighting, and sewing machines.

5. The imports of *blue* into this Colony are unimportant, but Germany furnishes about 70 per cent. of the total quantity imported. The United States and Denmark collectively supply larger quantities of *cement* than the United Kingdom. The two former countries have been making headway in supplying cement, the article furnished by them being less expensive than the cement made in the mother country. The countries of origin of imported *matches* are chiefly Norway and Sweden, where suitable woods and cheap labour place these countries in a pre-eminently favourable position for the economic production of matches. There are two match factories in the Colony which are highly protected, the Customs duty on imported matches being 114 per cent. greater than the excise duty on the locally produced article, but the foreign match can be landed here so cheaply, that even with substantial protection the local factories cannot do more than appropriate a portion of the local trade in matches, and neither of the factories does any export trade.

6. *Shooks*, principally of oak for making rum casks, are chiefly got from the United States, where supplies of suitable woods are more abundant than in the United Kingdom or any other part of the British Empire conveniently situated geographically to this Colony. The cost in the United States is rising rapidly and other sources of supply are badly wanted.

7. The United States supply the Colony with the major portion of patent and proprietary *medicinal preparations.*

8. The *lamps and lanterns* which come from the United States are of a cheap class made to sell among the lower classes. Donkey carts are a common means of transport with the masses and by regulation all such carts must carry a light between sunset and sunrise, and a lantern made in the United States called the "Dietz" is in great demand, because of its cheapness. The United Kingdom furnishes most of the finer classes of *writing, printing and account book papers*, but there is a class of *straw paper* largely used by small shopkeepers, which has during the past financial year (ended March 31st, 1912) been coming entirely from Holland. I enclose a sample of the paper which is of the cheapest kind obtainable.*

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* *See* note on next page.

BRITISH GUIANA—*cont.*

9. Greater quantities of *machinery and wire for electric lighting* come from the United States than from the United Kingdom. The Electric Light Company in Georgetown was created and is maintained by Canadian capital, and it is possible that purchases of their electric light plant are made in the States as a matter of convenience, especially as there is a varied and cheap supply of such articles to select from in that country. It may be, however, that some of such articles are of Canadian origin, but, being consigned through New York, may be credited in the Customs Statistics to the United States. It is very difficult, and in fact impossible, to get absolutely correct information at all times with respect to countries of origin, and the statistics of this Colony from the commencement of the financial year 1912–13 are being kept according to the countries of consignment. Supplies of *sewing machines* come mainly from the United States. Germany has also been making headway lately, the machines supplied by the Germans being cheaper than either the American or British makes.

10. A greater number of *motor cars* are imported from the United States than from British sources, but the American cars are considerably cheaper on the average than the British cars, which are generally too heavy for a flat country like this. The two principal makes imported here are manufactured in Detroit, U.S.A., and as the companies making these are wealthy and well organized it will not be an easy matter to successfully compete with them in the matter of cheap cars in the West Indian markets.

TEXTILES, ETC.

11. I enclose samples* of certain classes of textiles which are procured from foreign countries, but the annual import quantities and values of the various classes are not obtainable for the reason given above. The samples of cotton trousering forwarded are of American manufacture, and this article is being imported from the United States in larger quantities every year, whilst its importation from the United Kingdom has dwindled to a negligible quantity, because the American article can be purchased at less cost. Germany too has been successful in securing orders from this market for this class of goods, and although the orders are small it helps to accentuate the fact that British manufacturers are losing ground as far as such trouserings are concerned. Khaki drills are chiefly imported from the United States on account of their cheapness. It may be of interest to note that the importations of "linen, cotton and woollen goods" from the United States of America during the years 1909–10 and 1910–11 were $60,707 and $39,144 respectively. Such goods were made up almost exclusively of khaki and other drills and cotton trouserings. Several classes of manufactured goods of German origin find their way into this market to the prejudice of similar goods manufactured in the United Kingdom. Of these goods haberdashery, toys, glass beads, enamelled wares, glass ornaments and drinking glasses are the principal items, but as they are not separately enumerated in the statistics of the department the quantities and values of imports from each country cannot be furnished. I enclose a few samples* of cloths imported by local firms from foreign sources. The sample marked "A2" is unbleached cotton twill of American make. The importer states that although the selling price is the same as that of a similar British make the American article is in vastly greater demand, and has almost entirely displaced the British production. Samples "B" and "C" are cloths exclusively manufactured in and obtained from the United States. Sample "B" is known as "dungaree," and is sold locally at 16 cents per yard. Sample "C" is a cheap print sold at 5 cents per yard; it is claimed that this print is a fast colour, and that British manufacturers are unable to produce a similar article (fast colour) at the price.

12. A study of the situation in general leads me to the conclusion that the factor of price has a most important bearing upon supersession of British trade in certain classes of goods, and it would seem that it is generally in the cheapest grades of articles that foreign countries are able to extend business to the detriment of British manufactures. There is a popular impression amongst many people that British manufacturers are averse to manufacturing articles of an extremely cheap and tawdry nature; but apart from this they may be reluctant to turn out articles that can only have perhaps a sale limited to particular parts of the tropics, but at the same time there is money to be made in this way, otherwise German and American business men would cease to produce a line of goods that proved non-productive.

13. The following points have also a bearing upon the matter which forms the subject of this report.

* These samples may be seen by British manufacturers and shippers on application at the Commercial Intelligence Branch of the Board of Trade, 73, Basinghall Street, London, E.C.

British Guiana—*cont.*

Commercial Travellers.

14. It cannot be said as a rule that British commercial travellers handle their samples to the utmost advantage in this market. Travellers frequently represent upwards of six houses each, and consequently carry a numerous variety of samples, with many of which they are not infrequently entirely unacquainted. On the other hand, travellers from the United States specialise, so to speak, and each traveller carries with him the lines with which he is thoroughly conversant. It naturally follows that such intimate knowledge, well applied, helps to secure orders which might otherwise be lost.

Freight and Exchange Rates.

15. Freight rates naturally have a direct effect upon the selling price of imported goods. Britain's only competitor in this Colony in certain classes of manufactured goods which has an advantage in rates of freight is the United States. From enquiries made amongst importers it would appear that freight on most goods from the United States averages twelve cents per foot as against twenty-one cents per foot from the United Kingdom. Reducing these rates to a basis of value as far as it is possible to do so, it is reckoned that the Americans have an advantage in freight rates equal to an average of about one per cent. of the value of the goods. The rates of exchange are also in favour of the United States, bills being obtained on New York at a half per cent. discount, whilst a bill on London is at a premium of one and a half per cent.

Packages and Packing of Goods.

16. American manufacturers, I am told, seldom or never make any charge for packages or for packing of goods, and the absence of these charges it would appear further reduces the landed cost of goods from that country. It may be, however, that the American manufacturer includes the expense of packing in the wholesale cost of the goods.

Price Lists and Catalogues.

17. Complaints are made that the majority of British houses do not pay sufficient attention to detail, and to keeping their catalogues and price lists up-to-date, the Americans and Germans being ahead of them in these respects. Most British firms are said to supply the same catalogues year after year with very few if any additions thereto, whereas the American and German firms are always issuing new and up-to-date lists profusely illustrated with drawings, photographs, &c., and containing minute descriptions of even the smallest articles.

Finish and Appearance of Goods.

18. Another matter in which the British manufacturer is said to show to disadvantage with the foreign firms, especially the American and German, is in the manner in which certain articles are prepared for sale. Such things as trunks, canisters, travelling bags, toilet requisites, perfumes, soaps and even tools are as a rule very attractively got up and packed by American and German houses, so that, given two articles of the same kind and selling price, the smart and attractive appearance of the foreign-made one will usually result in its being taken in preference to the article of British manufacture.

General.

19. In conclusion I may say that I consider British trade would be assisted by the sending of fewer catalogues, and more commercial travellers. I quite realise the value of the catalogue as an advertising medium, particularly in certain lines of business, and no doubt it yields profitable results, otherwise British manufacturers would not continue the distribution of catalogues, but as a method of creating openings for British trade I think it is overdone, and a smart traveller with a good knowledge of his business, and all other things being equal, will do more to extend British trade in a week than advertising by catalogue will do in twelve months.

20. American and German manufacturers will go to quite a lot of trouble to suit their customer's tastes, and this obliging disposition not infrequently secures for them a certain amount of trade which otherwise might have remained with British traders.

BRITISH GUIANA—*cont.*

21. As previously pointed out in this report, it is mostly in the cheaper classes of certain kinds of goods that Britain is losing ground. Where quality is a prime consideration she can still hold her own, but in nearly all the Crown Colonies and Protectorates situated within the tropical belt the large majority of the population has no great amount of wealth for disbursement, and cheap articles of clothing and household utility naturally find a ready sale amongst them, so that the British manufacturer cannot afford to despise the production of articles of cheap and low-grade quality, even although he may feel disinclined to engage in such a trade.

22. I enclose a list of articles (Appendix II.) which are entirely (or nearly so) procured from foreign countries, and which I did not include in the statement asked for by you. The articles enumerated in the list are mostly agricultural products, and the reason that they are mostly secured from non-British sources requires, I think, no explanation.

I have, etc.,
J. M. REID,
Comptroller of Customs.

The Assistant Secretary,
(Commercial Department),
Board of Trade.

APPENDIX I.

STATEMENT showing the PRINCIPAL ARTICLES imported into the Colony for Home Consumption during each of the last three trade years, and which are chiefly imported from Non-British sources.

Articles and Countries.	1909-1910.		1910-1911.		1911-1912.	
	Quantities.	Values.	Quantities.	Values.	Quantities.	Values.
Blue—	Lbs.	£	Lbs.	£	Lbs.	£
United Kingdom	8,012	66	19,620	168	29,120	236
Germany	77,000	669	40,000	354	106,048	980
Holland	5,000	47	—	—	15,000	120
Other Countries	21,000	176	15,000	124	9,500	83
Total	111,012	958	74,620	646	159,668	1,419
Bran and Pollard—						
United Kingdom	56	⅓	—	—	—	—
British Possessions...	45,700	162	46,168	137	62,888	215
United States	179,196	630	91,496	326	68,960	262
Total	224,952	792⅓	137,664	463	131,848	477
Bread and Biscuits, not fancy, in tins—						
United Kingdom	10,027	403	9,575	255	18,472	462
British Possessions...	17,658	478	14,399	411	12,969	341
United States	41,181	991	42,350	1,123	39,184	859
Other Countries	4	⅕	—	—	—	—
Total	68,870	1,872⅕	66,324	1,789	70,625	1,662
Butter—						
United Kingdom	7,450	451	59,332	2,869	45,473	2,517
British Possessions...	37,004	2,442	32,532	2,045	20,371	1,299
France	418,428	17,308	297,680	12,911	314,963	14,566
Denmark	39,205	2,873	52,299	3,671	85,384	5,582
Holland	19,193	1,211	13,487	884	13,033	603
Other Countries	3,489	214	7,463	445	2,970	174
Total	524,769	24,499	462,793	22,825	482,194	24,741
Butter Substitutes—						
United Kingdom	224	6	—	—	200	2
British Possessions...	32,628	712	2,500	62	2,000	46
United States	61,920	1,385	90,200	2,068	88,508	1,796
Holland	11,800	237	11,410	281	28,336	551
Total	106,572	2,340	104,110	2,411	119,044	2,395

British Guiana—*cont.*

Appendix I.—*cont.*

Articles and Countries.	1909–1910.		1910–1911.		1911–1912.	
	Quantities.	Values.	Quantities.	Values.	Quantities.	Values.
Cement—	Barrels.	£	Barrels.	£	Barrels.	£
United Kingdom	8,199	2,757	6,873	2,948	3,721	1,731
United States	3,562	1,083	1,301	421	2,575	878
Denmark	100	40	332	64	2,160	924
Other Countries	1,400	615	1,736	709	868	336
Total	13,261	4,495	10,242	4,142	9,324	3,869
Cheese—	Lbs.		Lbs.		Lbs.	
United Kingdom	13,170	532	17,333	684	18,230	839
British Possessions...	37,152	1,256	33,140	1,078	46,188	1,640
United States	4,001	144	2,694	104	11,533	438
Holland	192,728	5,825	161,376	4,978	159,490	4,941
Other Countries	29	1	3,128	102	2,389	73
Total	247,080	7,758	217,671	6,946	237,830	7,931
Hams—						
United Kingdom	45,892	2,033	39,343	2,079	46,712	2,186
British Possessions...	1,191	40	—	—	—	—
United States	214,026	7,041	204,955	6,779	232,870	8,394
Other Countries	—	—	12	½	—	—
Total	261,109	9,114	244,310	8,858½	279,582	10,580
Lard and Lard Compounds—						
United Kingdom	1,070	32	5,083	150	480	16
United States	320,654	8,163	312,523	7,999	337,378	7,514
Total	321,724	8,195	317,606	8,149	337,858	7,530
Matches—	Gross of boxes.		Gross of boxes.		Gross of boxes.	
United Kingdom	33	3	900	74	1,140	89
Norway	51,806	4,231	10,860	1,054	16,560	1,699
Sweden	3,905	299	4,690	278	13,580	1,038
Other Countries	2,160	151	180	11	2,160	176
Total	57,904	4,684	16,630	1,417	33,440	3,002
Meats (Canned)—	Lbs.		Lbs.		Lbs.	
United Kingdom	29,045	1,361	29,685	1,288	36,547	1,694
British Possessions...	12,649	365	2,445	98	1,128	27
United States	58,620	1,843	50,922	2,096	87,148	3,568
Other Countries	1,199	83	1,556	117	673	37
Total	101,513	3,652	84,608	3,599	125,496	5,326
Oats—						
United Kingdom	738,392	3,384	403,852	1,698	649,152	2,795
British Possessions...	402,776	1,876	424,576	1,485	1,009,840	4,131
United States	699,328	2,673	668,512	2,274	1,873,936	7,193
Holland	3,690,860	16,412	2,590,352	10,991	1,354,180	5,727
Russia	264,000	1,329	593,280	2,470	423,364	2,019
Other Countries	25,084	117	59,840	238	—	—
Total	5,820,440	25,791	4,740,412	19,156	5,310,472	21,865
Shooks—	Packs.		Packs.		Packs.	
United Kingdom	531	592	757	724	1,295	1,004
United States	328	470	925	1,043	3,524	3,627
Total	859	1,062	1,682	1,767	4,819	4,631
Medicinal Preparations, containing spirits (not Official)—	Gallons.		Gallons.		Gallons.	
United Kingdom	66	178	122	315	112	232
British Possessions...	90	65	45	77	105	128
United States	991	2,390	1,219	2,573	1,024	2,389
Other Countries	10	3	10	2	2	7
Total	1,157	2,636	1,396	2,967	1,243	2,756

BRITISH GUIANA—*cont.*

APPENDIX I.—*cont.*

Articles and Countries.	1909–1910.		1910–1911.		1911–1912.	
	Quantities.	Values.	Quantities.	Values.	Quantities.	Values.
Motor Cars—	No.	£	No.	£	No.	£
United Kingdom	7	4,542	5	938	17	5,533
British Possessions...	—	—	2	662	—	—
United States	2	553	5	727	26	5,341
Total	9	5,095	12	2,327	43	10,874
Lamps and Lanterns—						
United Kingdom	—	1,035	—	822	—	674
United States	—	1,159	—	1,170	—	750
Other Countries	—	229	—	102	—	106
Total	—	2,423	—	2,094	—	1,530
Paper and Paper Manufacture—						
United Kingdom	—	1,459	—	2,658	—	2,613
British Possessions...	—	338	—	388	—	212
Holland	—	—	—	—	—	3,989
France	—	1,076	—	871	—	919
Germany	—	189	—	324	—	435
Other Countries	—	303	—	320	—	317
Total	—	3,365	—	4,561	—	8,485
Fruits and Vegetables (Fresh)—						
United Kingdom	—	39	—	110	—	178
British Possessions...	—	233	—	328	—	262
United States	—	1,324	—	1,163	—	1,597
Spain...	—	286	—	323	—	220
Other Countries	—	155	—	195	—	18
Total	—	2,037	—	2,119	—	2,275
Machinery and Wire for Electric Lighting—						
United Kingdom	—	629	—	1,250	—	3,655
British Possessions...	—	12	—	—	—	—
United States	—	1,384	—	1,192	—	4,988
Other Countries	—	—	—	—	—	46
Total	—	2,025	—	2,442	—	8,689
Sewing Machines—			No.		No.	
United Kingdom	—	973	258	569	401	687
United States	—	1,446	631	1,309	622	1,340
Germany	—	276	103	201	353	556
Other Countries	—	—	—	—	8	18
Total	—	2,695	992	2,079	1,384	2,601

APPENDIX II.

LIST OF ARTICLES IMPORTED ALMOST EXCLUSIVELY FROM NON-BRITISH SOURCES.

Arrowroot.
Bee Culture, supplies for.
Beef, pickled.
Brimstone and Sulphur.
Coffee, raw.
Corn or Maize.
Cornmeal.
Cotolene.
Crushed and ground feed.
Currants.
Garlic.
Mules.
Oils, Cotton Seed.
„ Lard.
Oils, Petroleum.
Opium.
Pitch.
Pork, pickled.
Quicksilver.
Sago.
Sheep.
Spirits, Brandy.
„ Gin.
Staves and Headings.
Stearine.
Tobacco, in Leaf.
Wine, in bulk.

BERMUDA.

Colonial Secretary's Office, Bermuda.
14th February, 1913.

SIR,

I AM directed by the Governor of Bermuda to transmit to you herewith, for the information of the Board of Trade, the accompanying Report, with a Statistical Table, on the trade of Bermuda with especial reference to the position of British trade.

I have, &c.,
R. POPHAM LOBB,
Colonial Secretary.

The Assistant Secretary,
Commercial Department,
Board of Trade.

REPORT ON BRITISH TRADE WITH BERMUDA.

Table A gives the total value of the imports into Bermuda for ten years (1902 to 1911).

The principal sources from which the imports were derived were the United States, the United Kingdom, Canada, other British Colonies and other Foreign countries, in the order named.

The high figures during the four years 1902, 1903, 1904 and 1905 were due to exceptional and temporary causes, viz. :—the presence of the Boer prisoners of war, with two additional regiments in garrison and the large Imperial expenditure on the improvements to the Dockyard.

The average annual value of the imports from each of the above sources during the ten-year period 1902–11 was as follows :—

	£
United States	261,044
United Kingdom	158,056
Canada	73,948
Other British Possessions	9,271
Other Countries	3,036

Table B compares the annual value of the total imports from British and Foreign sources for the same period and shows the annual difference between them.

The average annual value of the total imports from British sources was £241,275 and of those from Foreign sources £264,080 ; the average annual difference in favour of Foreign sources being £22,805.

In seeking a standard of comparison for the growth of British and Foreign trade with Bermuda in recent years, it is more satisfactory to take the figures for the year 1899, when the temporary causes mentioned in paragraph 3 had not begun to affect the imports.

These figures were as follows :—

Imports in 1899 and 1911.

	From United Kingdom.	From British Possessions.	From United States of America and other Foreign Countries.
	£	£	£
1899...	104,408	40,558 (Canada, £33,119)	249,640 (United States, £246,447)
1911...	153,867	92,322 (Canada, £84,129)	299,351 (United States, £297,681)

It will be seen that the trade with the United Kingdom increased by 47 per cent., that with Canada by 154 per cent., and that with Foreign Countries by about 20 per cent.

The most important fact brought out by this comparison is the large growth in the imports from Canada. These consist largely of articles such as flour, hay, and other agricultural products, which twenty years ago were imported principally from the United States.

Table C gives the quantities and value of the principal imports into Bermuda from the United Kingdom, British Possessions, the United States of America and all Countries, for each of the years 1910 and 1911.

In the following Table these imports are placed under the heading of the source from which they are principally imported :—

United Kingdom.	British Possessions.	United States.
Clothing.	Butter.	Beef-quarters.
Confectionery.	Bran.	Building materials.
Cotton goods.	Box material.	Cement.
Fancy goods.	Cheese.	Carriages.
Fruit and Meats (canned).	Fish (preserved).	Coffee and cocoa.
Hardware.	Flour.	Corn.
Jewellery.	Hay.	Drugs.
Linen goods.	Jewellery.	Electrical goods.
Oilmen's stores.	Oats.	Fertilizer.
Oils and paints.	Potatoes.	Furniture.
Silk goods.	Tea.	Groceries.
Tea.		Leather, manufactured.
Woollen goods.		Metal, manufactured.
Bicycles.		Machinery.
Cigarettes.		Oil, Kerosene.
Malt liquor.		Paper.
Whiskey.		Meats (smoked and salted).
Wine.		Poultry and meats.
		Sugar.
		Cigars.
		Eggs.
		Horses.
		Oxen and cows.
		Tobacco.

Before dealing in detail with the reasons for the success of foreign competition, it is desirable to consider the general factors which affect the trade of Bermuda.

The first of these is the steamship communications with other ports, which at present are :—New York, a weekly service by two lines of steamers ; Canada, a service by steamers for the West Indies, arriving at Bermuda fortnightly ; England, a service by a freight steamer of the Cayo Line, leaving London every six weeks for Gulf Ports and touching at Bermuda.

The steamers from New York bring all American imports, a portion of the Canadian, and about half of the English ; the Canadian Steamers bring the greater part of the imports from Canada ; and the English Steamers bring about one half of the imports from London.

Secondly, the freight charges on American and Canadian goods are reasonable, but those on English goods, whether shipped *viâ* New York or by direct steamer, are high, those by the latter being kept up by the high cost of the alternative route. This, as will be pointed out later, affects British trade adversely in the case of some at least of the articles which are now imported principally from the United States.

Thirdly, the large floating population of American Tourists and Winter residents, averaging in all about 26,000 annually, affects British trade favourably by increasing the market for English clothing and other goods.

The imports from Canada mentioned in that Table will also continue to increase, especially if the proposed new weekly steamship service between Canada, Bermuda and Jamaica materialises. If, as is probable, a market can be found in Canada for Bermuda's agricultural produce which requires chill-room accommodation, that service will result in a substantial increase in the imports of other articles from Canada instead of from the United States.

An important factor in the maintenance of the trade with Great Britain is the fact that the Colony is frequently visited by English commercial travellers, who appear to achieve considerable success, especially in the following lines :—Soap, Toilet articles, Spirits, and Provisions (canned).

Imports from the United States which are greater in quantity and value than similar goods of British Origin.

A list of these imports is included in the Table given earlier in this report, and the quantities and values during the two latest years for which details are available are shown in Table C.

To deal with them in detail :—

Beef (Quarters), valued at £11,981 in 1911.—Although the United States is not the cheapest market it is at present the only possible source from which meat may be imported, owing to the lack of chill-room accommodation in other steamship connections.

Building Material, valued at £2,819 in 1911.—This includes ready-made doors, blinds, and sash of American pine. The United States is the cheapest source of supply for the class of goods required.

Cement, valued at £1,343 in 1911.—At present the United States is the cheapest source. But the uncertain and infrequent sailings and high freight of the direct steamship communication with London diverts this trade from the United Kingdom to a considerable extent.

Carriages, valued at £2,772 in 1911.—The bulk of the carriages imported are used for the conveyance of American tourists, and the type of carriage preferred by the trade is of American manufacture. High rates of freight preclude any British trade in this article.

Coffee and Cocoa, valued at £2,485 in 1911.—The grade of coffee which satisfies the local market is South American coffee, which can be imported cheaper from the United States. The same reason applies to cocoa.

Corn, valued at £5,927 in 1911.—This is Indian corn for poultry and cattle. The United States is the only source of supply.

Drugs, valued at £5,556 in 1911.—These are chiefly American patent medicines, which are extensively advertised and find a large sale among the poorer classes of the population.

Electrical Goods, valued at £7,270 in 1911.—There is only one electrical concern in the Colony. The fact that the Superintendent of this Company, until recently, was an American, accounts largely for the imports of these goods from the United States. There seems to be no reason why British firms should not obtain the principal show in this trade. The motive power used by the Company is producer gas, of which they have 3 units, 1 American and 2 English. The latter I am informed are greatly superior to, and cost considerably less than, the American.

Fertilizer, valued at £6,389 in 1911.—The fact that all the agricultural produce of Bermuda is exported to New York, with the resulting trade connections, accounts for the trade in this article with the United States. High freights would prevent the importation from Great Britain of any large quantity.

Furniture, valued at £9,273 in 1911.—The furniture imported from the United States is of uncured wood, badly constructed and of poor design. It is also expensive as compared with the cost in England of the style of furniture in demand among a similar class of people. The freight rate per cubic foot from England, which is very high on articles which bulk so largely as furniture, prevents any trade. It is suggested that English furniture which could be shipped in "Knock-down" form might find a good sale.

Groceries, valued at £6,624 in 1911.—Owing to quick shipping connections, the United States will probably always retain the greater part of this trade, especially in articles which are perishable.

Leather, Manufactured, valued at £12,680 in 1911.—This consists principally of Boots and Shoes, and Harness. The grades of shoes imported are inferior to and much cheaper than English goods, but are imported to meet the local demand for a smart-looking, cheap shoe. The same remark applies to Harness.

Metal, Manufactured, valued at £3,356 in 1911.—This includes Stoves, Kitchen ware, and numerous other articles. The class is too mixed to enable any opinion to be formed as to the causes, other than propinquity, of the preponderance of these imports from the United States.

Machinery, valued at £4,982 in 1911.—Steam engines and boilers, motor boat engines of a cheap grade, ice and electric light machines. High freight from England and cheapness in the United States are the determining factors in this case.

Oil, Kerosene, valued at £5,095 in 1911.—The United States is the natural source of supply.

Paper, valued at £1,867 in 1911.—This is nearly all used in newspaper work. The importers state that they cannot obtain a similar grade in England.

Meats, Smoked and Salted, valued at £13,950 in 1911.—These are Ham, Bacon and smoked and salted Beef. As compared with English products they are much inferior, but still of fair quality, and can be imported and sold here at a cheaper rate.

Poultry and Meats, valued at £3,422 in 1911.—The necessary chill-room accommodation for importing these, exists only in the case of the Steamers running between Bermuda and New York.

Soap and Starch, valued at £2,563 in 1911.—The trade in this article is divided nearly equally between the United Kingdom and the United States.

Sugar, valued at £6,497 in 1911. (United Kingdom, £2,349; West Indies, £3,152.)—The sugar from the United States is granulated sugar. It is not cheaper than English sugar, but can be imported at more frequent intervals and in smaller quantities by the small retailer.

Cigars, valued at £994 in 1911.—Imported to meet requirements of American tourists.

Eggs, valued at £2,662 in 1911.—New York is the natural source of supply for the quantity required in excess of the local production.

Horses, valued at £5,870 in 1911.—The risks of the sea voyage prohibit the importation of these from any other port but New York.

Oxen and Cows, valued at £24,859 in 1911.—Up to the present date (1912) the United States has been the only source of supply of cattle, but recently the principal importers have arranged for shipments direct from the Argentine.

Tobacco, valued at £2,224 in 1911.—This consists chiefly of cheap grades of tobacco consumed by the labouring classes, of a kind not produced in the United Kingdom.

It will be seen from the foregoing remarks on particular imports that the main causes which affect the trade of Bermuda are its geographical position, in close proximity to the markets of the United States, and the comparatively limited and infrequent steamship communication with other countries. No considerable development of British trade can be expected until a direct fast service with England has been re-established, leaving for Bermuda at least once a month regularly, or oftener.

In one case, that of furniture (the annual value imported being about £10,000), it is suggested that British manufacturers may increase their trade with Bermuda by providing a class of furniture strongly made, simple in form and of well-seasoned material, which may be shipped "Knocked down" for re-assembling here, so as to reduce the freight charges.

TABLE A.

TOTAL IMPORTS, AND IMPORTS FROM PRINCIPAL SOURCES, 1902–1911.

Year.	United Kingdom.	Canada.	Other Possessions.	United States.	Other Countries.	Total.
	£	£	£	£	£	£
1902	195,675	52,131	13,523	321,487	3,346	586,162
1903	204,171	65,693	9,457	289,371	3,008	571,700
1904	233,405	86,171	12,684	295,054	5,096	632,410
1905	179,050	81,146	12,409	264,797	5,820	543,222
1906	116,993	55,451	9,757	218,702	2,773	403,676
1907	121,831	72,388	6,317	215,794	4,266	420,596
1908	103,581	75,055	5,923	206,587	1,376	392,522
1909	113,946	83,885	6,799	233,982	2,036	440,648
1910	158,043	83,429	7,648	266,981	973	517,074
1911	153,867	84,129	8,193	297,681	1,670	545,540
Annual Average	158,056	73,948	9,271	261,044	3,036	505,355

TABLE B.

COMPARISON BETWEEN IMPORTS FROM BRITISH AND FOREIGN SOURCES, 1902–1911.

Year.	From British Sources.	From Foreign Sources.	Difference.	
			In favour of British.	In favour of Foreign.
	£	£	£	£
1902	261,329	324,833	—	63,504
1903	279,321	292,379	—	13,058
1904	332,260	300,150	32,110	—
1905	272,605	270,617	1,988	—
1906	182,201	221,475	—	39,274
1907	200,536	220,060	—	19,524
1908	184,559	207,963	—	23,404
1909	204,630	236,018	—	31,388
1910	249,120	267,954	—	18,834
1911	246,189	299,351	—	53,162
Annual Average ...	241,275	264,080	—	22,805

BERMUDA—*cont.*

TABLE C.

STATEMENT showing the Total Quantity and Value of the Principal Articles Imported into Bermuda in each of the years 1910 and 1911—distinguishing Imports from the United Kingdom, British Possessions and the United States.

Principal Articles Imported.		1910.				1911.			
		United Kingdom.	British Possessions.	United States.	All Countries.	United Kingdom.	British Possessions.	United States.	All Countries.
Beef	Tons	—	—	285	285	—	—	215	215
	£	—	—	16,279	16,279	—	—	11,981	11,981
Bicycles	No.	386	15	113	514	314	—	183	497
	£	1,461	87	569	2,117	1,951	—	880	2,831
Bran	£	—	2,839	2,904	5,743	—	5,633	2,381	8,014
Bread	£	1,161	591	1,981	3,733	1,617	605	1,881	4,103
Building Materials	£	1,362	211	4,848	6,421	235	585	2,819	3,639
Box Materials ...	£	—	3,261	13	3,274	—	6,473	1,479	7,952
Butter	Tons	25	103	14	142	32	67	52	151
	£	2,617	11,861	2,042	16,520	2,035	8,282	6,115	16,432
Cement	£	Included under "Building Materials"				714	—	1,343	2,057
Carriages	£	10	14	1,560	1,584	—	—	2,772	2,772
Cheese	Cwts.	3	1,200	100	1,303	13	600	640	1,253
	£	48	3,975	379	4,402	72	1,973	2,307	4,352
Clothing	£	26,295	528	9,418	36,241	33,614	366	9,160	43,140
Coffee and Cocoa	Tons	3	—	17	20	4	—	38	42
	£	335	9	1,404	1,748	462	—	2,485	2,947
Corn	Bushels	—	—	37,042	37,042	—	—	37,956	37,956
	£	—	—	5,219	5,219	—	—	5,927	5,927
Confectionery ...	£	1,644	90	1,510	3,244	1,976	59	2,147	4,182
Cotton Goods ...	£	11,781	60	7,530	19,371	11,007	39	7,366	18,412
Drugs	£	1,903	199	3,701	5,803	1,524	355	5,556	7,435
Eggs	Dozens	12	7,787	38,842	46,641	184	5,126	47,002	52,312
	£	2	459	2,408	2,869	7	290	2,662	2,959
Electrical Goods	£	1,686	—	5,952	7,638	828	—	7,270	8,098
Fertilizer	£	1,690	42	5,801	7,533	1,588	180	6,389	8,157
Fish—Preserved	£	925	5,906	1,032	7,863	1,305	5,711	1,504	8,520
Fancy Goods ...	£	4,760	121	2,378	7,259	4,722	113	1,813	6,648
Flour	Barrels	334	17,778	4,105	22,217	552	17,113	4,312	21,977
	£	271	16,589	4,020	20,880	428	16,978	4,083	21,489
Fruit and Meats—Canned	£	8,743	632	6,776	16,151	9,413	826	7,289	17,528
Furniture	£	1,310	492	7,231	9,033	1,033	526	9,273	10,832
Groceries	£	2,844	549	5,398	8,791	2,125	772	6,624	9,521
Hardware ...	£	4,567	438	3,497	8,502	3,441	917	3,794	8,152
Hay	£	—	3,936	511	4,447	—	4,063	276	4,339
Jewellery	£	5,192	2,406	6,860	14,458	3,790	3,230	5,096	12,116
Live Stock ... Horses	No.	—	70	100	170	—	51	182	233
	£	—	1,982	2,585	4,567	—	990	5,870	6,860
Oxen and Cows	No.	—	349	1,048	1,397	—	39	1,569	1,608
	£	—	4,450	17,068	21,518	—	473	24,859	25,332
Linen Goods ...	£	4,536	—	739	5,275	3,587	—	1,441	5,028
Leather Manufactures	£	2,006	193	14,001	16,200	1,866	151	12,680	14,697
Malt Liquor ...	Hogsheads	4,299	—	30	4,330	5,230	—	56	5,286
	£	12,673	—	981	13,681	13,028	—	1,708	14,736
Metal Manufactures	£	480	20	1,627	2,127	354	—	3,356	3,710
Machinery ...	£	5,295	—	6,891	12,186	643	50	4,982	5,675
Oil, Kerosene ...	Gallons	—	—	330,648	330,648	—	—	246,250	246,250
	£	—	—	5,594	5,594	—	—	5,095	5,095
Oats	Bushels	—	100,460	36,121	136,581	—	168,428	38,125	206,553
	£	—	7,881	2,810	10,691	—	9,879	3,312	13,191
Oilmen's Stores ...	£	2,587	19	513	3,119	3,451	—	—	3,451
Oils and Paints ...	£	1,828	197	1,325	3,350	3,684	189	1,756	5,629
Paper	£	203	829	1,663	2,695	278	855	1,867	3,000
Meats, Smoked and Salted	Tons	3	2	290	295	4	3	not stated	—
	£	470	183	16,561	17,214	413	245	13,950	14,608
Potatoes	£	43	4,674	2,238	6,955	771	5,268	3,744	9,783
Poultry and Meats, unenumerated ...	£	—	17	3,694	3,711	—	—	3,422	3,422
Soap and Starch ...	£	1,470	6	1,865	3,341	2,415	46	2,563	5,024

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on 31 October, 2019

BERMUDA—*cont.*

TABLE C—*cont.*

Principal Articles Imported.		1910.				1911.			
		United Kingdom.	British Possessions.	United States.	All Countries.	United Kingdom.	British Possessions.	United States.	All Countries.
Sugar	Tons	29	154	657	850	108	293	392	793
	£	530	2,025	9,626	12,335	2,349	3,152	6,497	11,998
Silk Goods ...	£	2,352	—	165	2,517	1,532	—	204	1,736
Tea	Tons	9	9	14	32	9	32	7	48
	£	794	961	1,164	2,919	811	920	739	2,470
Tobacco	Tons	2	1	17	20	3	1	14	18
	£	555	170	2,466	3,191	839	154	2,224	3,217
Cigars	No.	149,765	158,700	390,926	722,341	392,471	180,510	214,750	888,481
	£	384	689	985	2,249	407	646	994	2,960
Cigarettes ...	Cwts.	140	1	40	196	80	—	40	120
	£	2,973	21	857	3,986	2,333	—	1,393	3,726
Whiskey	Gallons	7,094	392	248	7,734	7,416	472	543	8,431
	£	2,487	142	120	2,749	2,304	162	267	2,733
Wine	£	2,255	3	174	2,432	3,584	—	226	3,810
Woollen Goods ...	£	10,322	33	1,929	12,284	7,823	64	1,672	9,559